Job Aid:

How to Create a New Sourcing Strategy in COMMBUYS CLM

-This Job Aid shows how to:

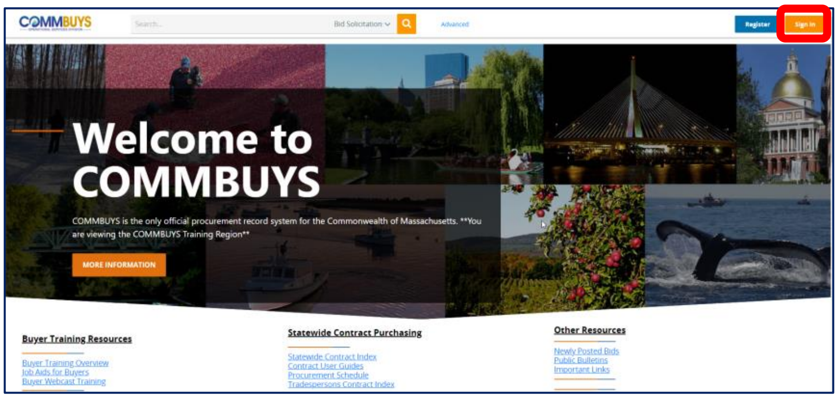
- Create a new Sourcing Strategy document in COMMBUYS CLM

Of Special Note:

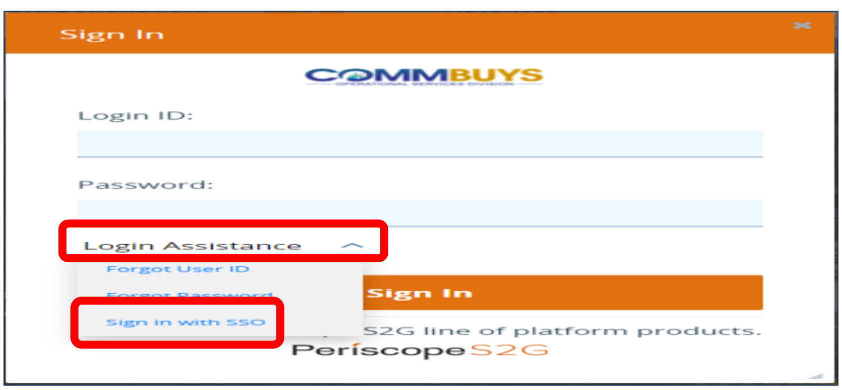
- Formulating a Sourcing Strategy can be helpful in creating a new contract. The Contract Lifecycle Management (CLM) system allows for the planning, execution, and maintenance of statewide and departmental contracts.
- Procurement exceptions (waivers) are described in the Buyer Job Aid **How to Request a Procurement Exception in COMMBUYS CLM.**

Screenshot	Directions

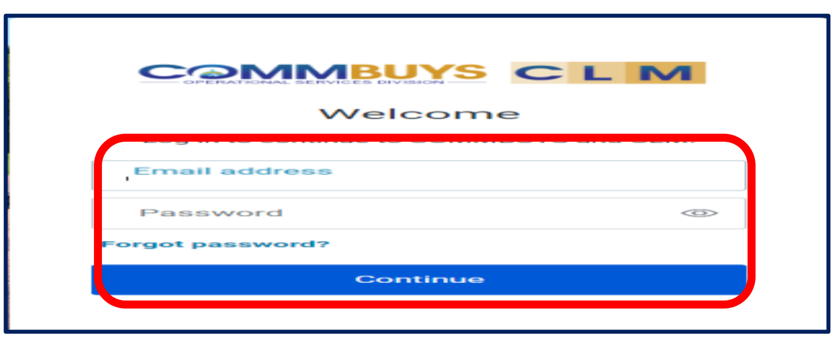
Step 1: Logging in



1. Launch the COMMBUYS website by entering the URL commbuys.com
2. Click on the orange **Sign In** button in the upper right-hand corner.

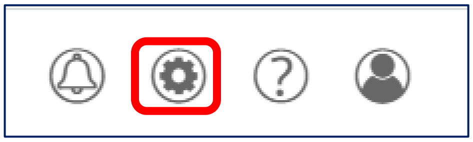


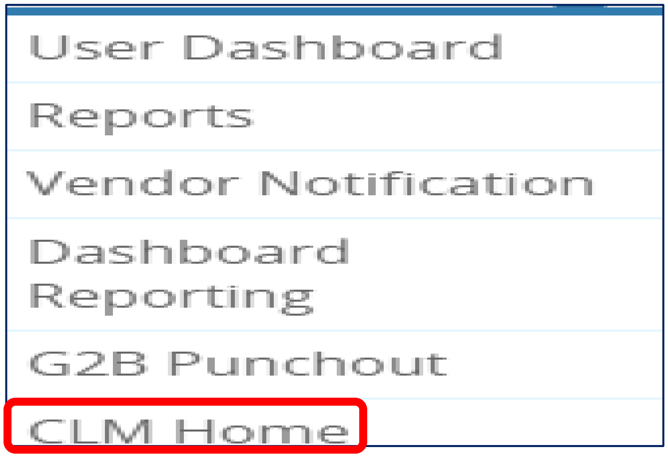
3. Click on the **arrow** next to the Login Assistance field, then select **Sign in with SSO** (Single Sign On) from the dropdown menu.



4. Enter your **Email Address** and COMMBUYS **Password** and click on the **Continue** button.

Screenshot	Directions

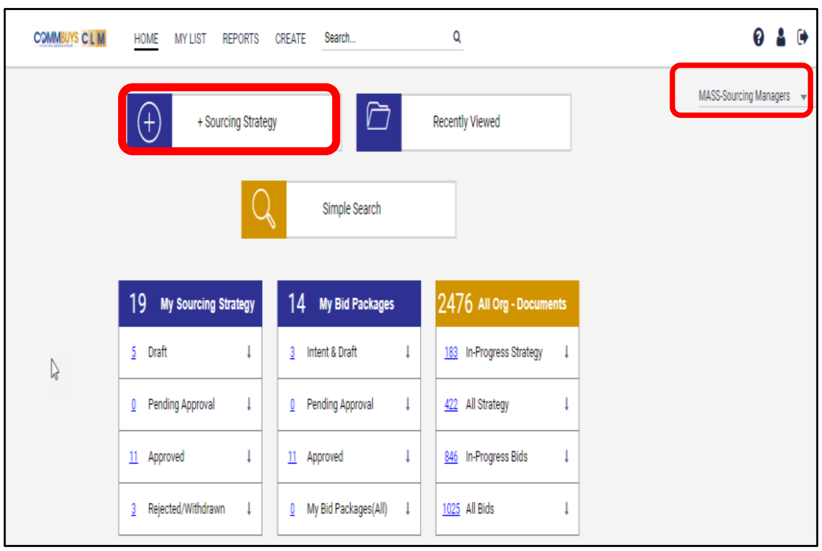




Step 2: Accessing CLM

1. When the COMMBUYS home page displays, click on the **Settings** icon at the top right of the page.

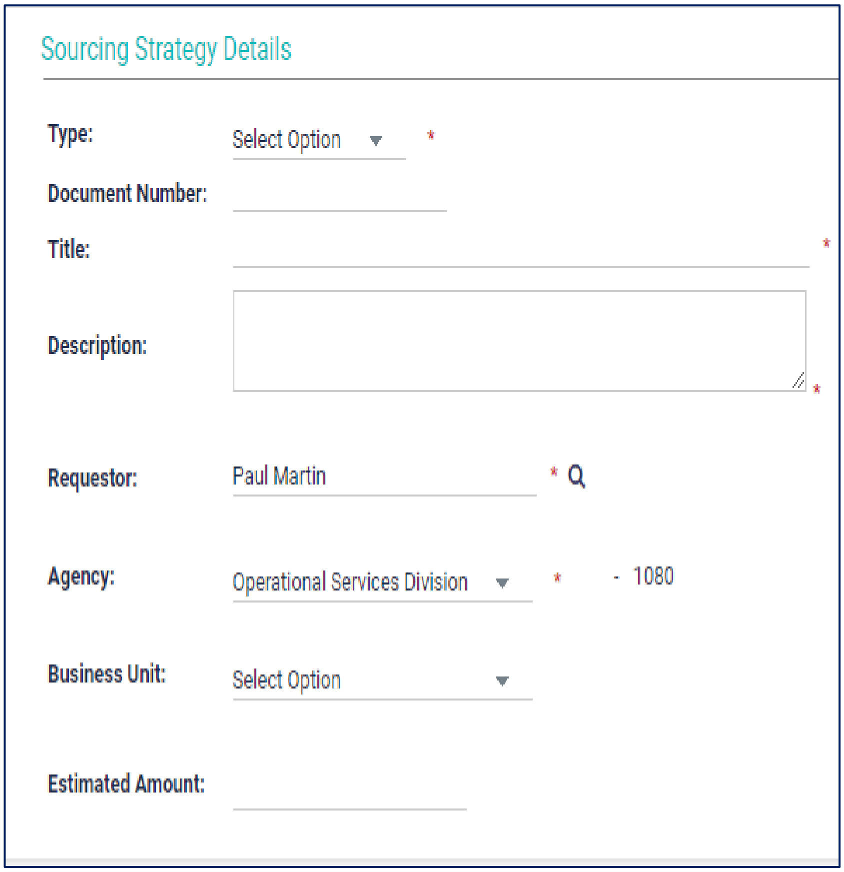
2. Select **CLM Home** from the dropdown menu.



Step 3: Initiating a Sourcing Strategy

1. Ensure that your profile is set to **MASS-Sourcing Managers** at the top right of the screen, then click on the **+Sourcing Strategy** button.

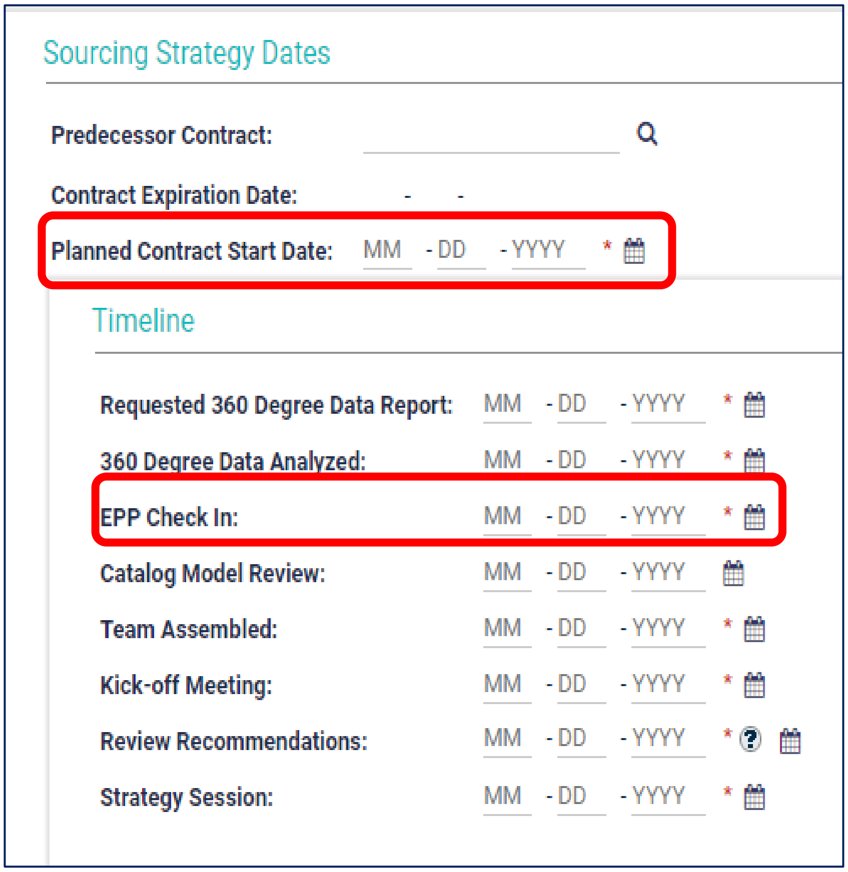
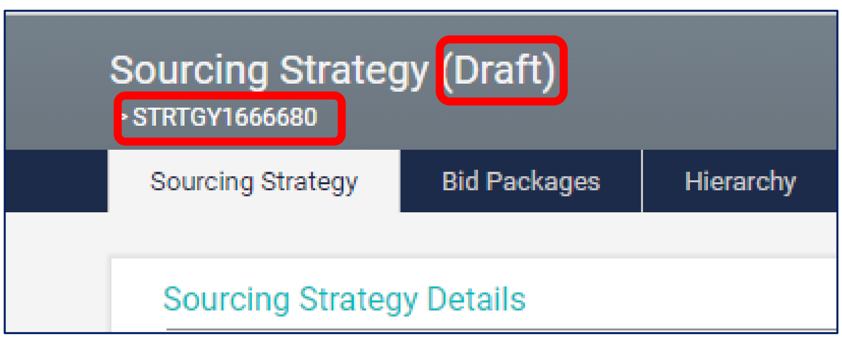
Screenshot	Directions



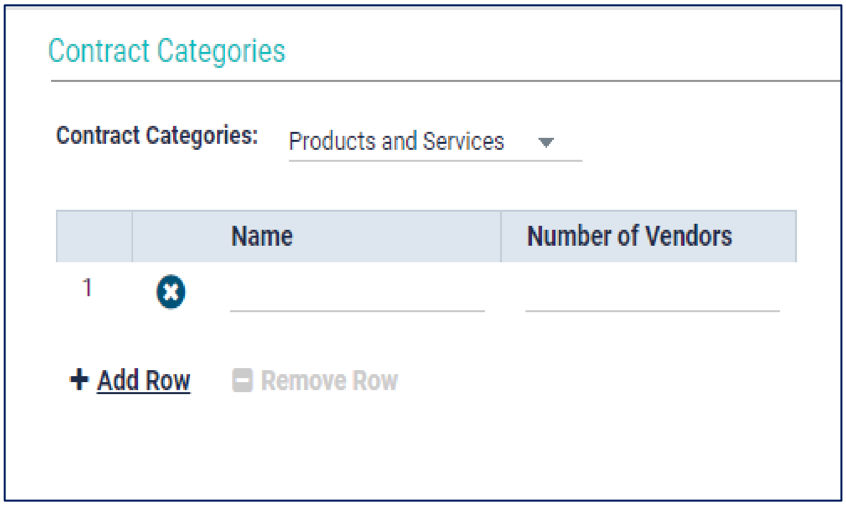
Step 4: Completing the Sourcing Strategy Details Section

NOTE: All required fields in CLM are identified with a red asterisk. After clicking on the **SAVE** button, any required fields not populated will be identified with a red error message and must be completed.

1. In the **Type** field, click on the **down arrow** next to Select Option and select **New** from the dropdown menu.
2. In the **Document Number** field, enter the new contract number.
3. In the **Title** field, enter the title of the new contract.
4. In the **Description** field, enter a description of the new contract.
5. The **Requestor** field auto fills with your name.
6. The **Agency** field auto fills with your agency OR choose from the dropdown menu.
7. In the **Business Unit** field, click on the **down arrow** next to Select Option and select your business unit from the dropdown menu.
8. In the **Estimated Amount** field, enter the total anticipated value of the new contract if known.

Screenshot	Directions
	**Step 5: Completing the Sourcing Strategy Dates Section** 1. Leave the **Predecessor Contract** and **Contract Expiration** fields blank. 2. In the **Planned Contract Start Date** field, enter the month, day, and year of the anticipated contract start date into the MM, DD, and YYYY text fields, or click on the calendar icon to enter. **NOTE:** When the planned contract start date is entered, the required fields in the Timeline subsection will auto fill except for the **EPP Check In** field which must be entered manually. These fields are set to an 18 month lead time but can be manually changed.
	
	3. Click on the **SAVE** button at the bottom of the page. **NOTE:** When the page redisplays, an auto generated **STRTGY** number appears at the top of the page and the status changes to **Draft**.

Screenshot	Directions



Step 6: Completing the Contract Categories Section

This section allows multiple categories within a contract to be identified.

1. In the **Contract Categories** field, click on the **down arrow** next to Select Option and select **Products, Services**, or **Products and Services** from the dropdown menu.

2. When identified, enter the name of the category in the **Name** column and enter the number of vendors, if known, within the category in the **Number of Vendors** column.

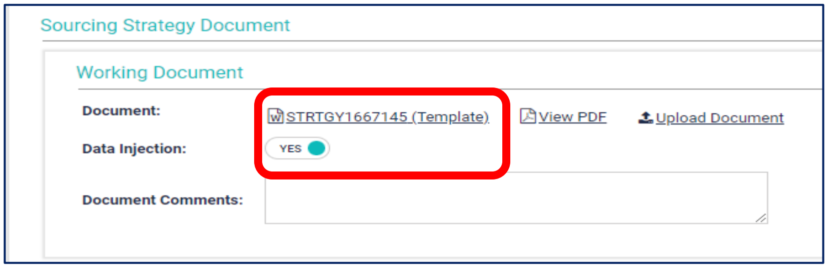
   NOTE: Additional categories can be added and populated by clicking on the **Add Row** hyperlink. Clicking on the **Remove Row** hyperlink will delete any rows that are not needed.

3. Click on the **SAVE** button at the bottom of the page.

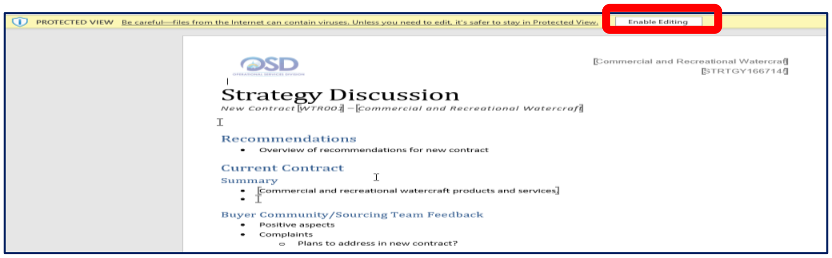
NOTE: The next section is the **Sourcing Strategy Document** section which contains two subsections:

- **Working Document**
- **Working Document Collaboration.**

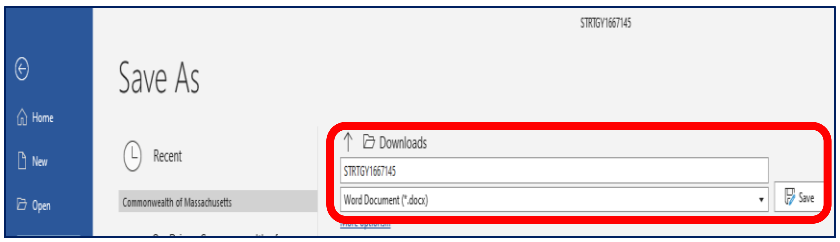
Step 7: Completing the Working Document Subsection



1. Ensure that the Data Injection field is set to **YES**, then in the Document field, click on the **Template** hyperlink, and click on the **.docx** popup box on the corner of your screen.

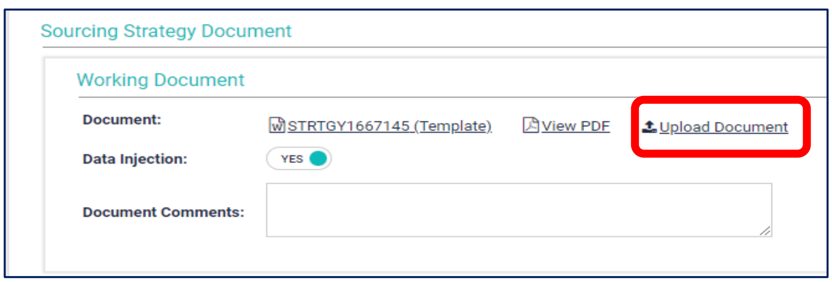


2. When the template for the **Strategy Discussion** document displays, click on the **Enable Editing** button on the yellow stripe at the top of the document. Edit and update the document as needed then click on **File** and **Save As.**

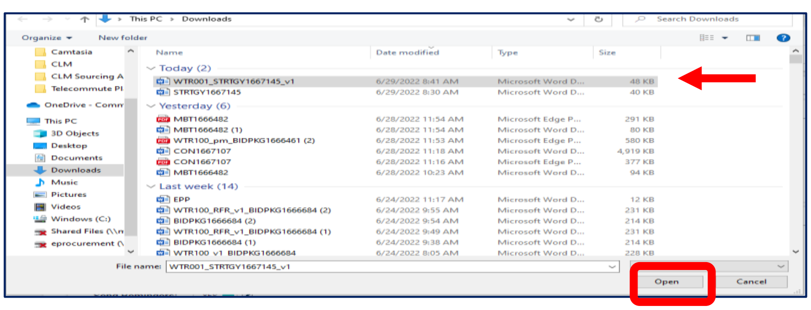


3. When the **Save As** page displays, ensure that the desired save destination is selected, then rename the document in the top field, and click on the **Save** button on the right.

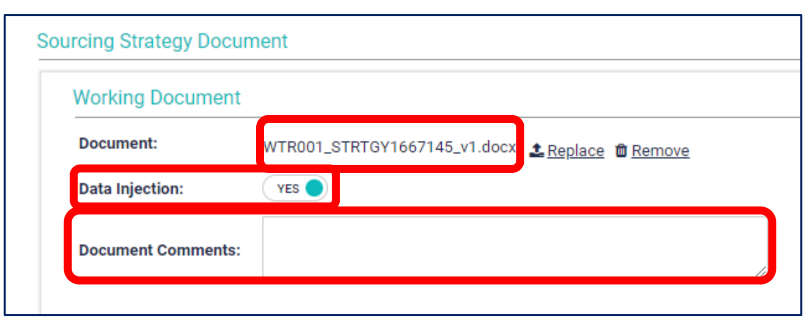
4. When the edited document re-displays, click on the **X** at the top right of the screen to close, and you are returned to the Working Document section.



5. Click on the **Upload Document** hyperlink.



6. Select the renamed document in the popup box, then click on the **Open** button.

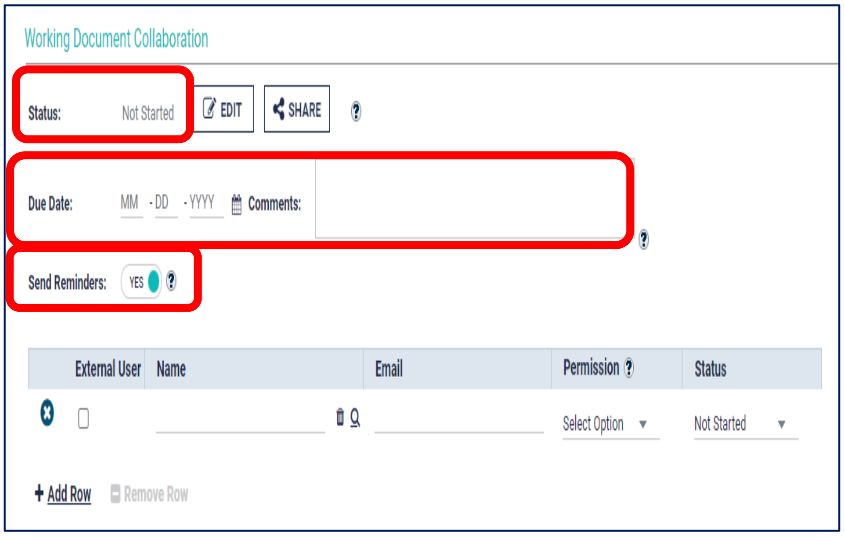


7. When the screen re-displays, the edited document name has replaced the Template in the **Document** field.

8. Ensure that the **Data Injection** field is still set to **YES**, then enter comments in the **Document Comments** field if desired.

9. Click on the **SAVE** button at the bottom of the page. The document is now hyperlinked.

Screenshot	Directions



Step 8: Completing the Working Document Collaboration Subsection

NOTE: At various stages in the **Contract Lifecycle Management** process, **c**ollaboration occurs among members of your Strategic Sourcing Team (SST).

1. The Status **Not Started** displays. Enter a date that collaboration comments will be due in the **Due Date** field.

2. Enter comments about the collaboration in the **Comments** text box if applicable.

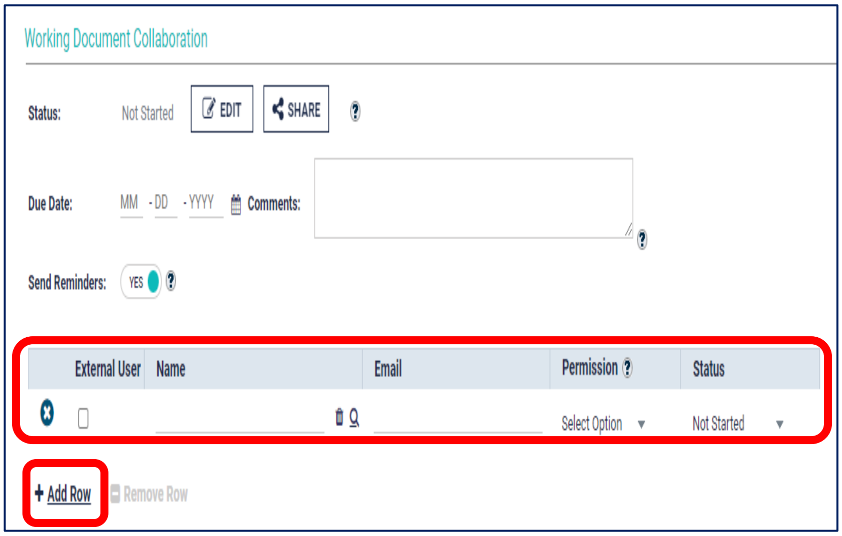
3. Ensure that **YES** displays in the **Send Reminders** field. Selecting YES means that the collaborators will receive a reminder notice 7 days in advance, and another reminder notice 2 days in advance of the due date.

NOTE: Collaborators can include users who are either external or internal to your work group.

- To add an external collaborator, go to **Step 9.**

- To add an internal collaborator, go to **Step 10.**

Screenshot	Directions

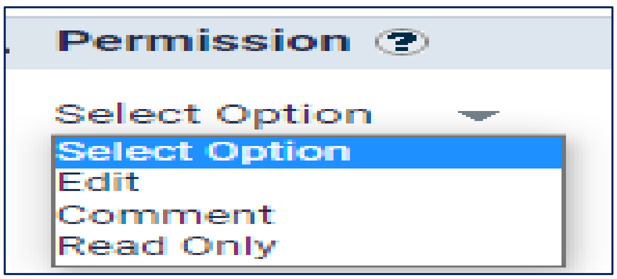


Step 9: Adding an External Collaborator

1. Select the **External User** checkbox.

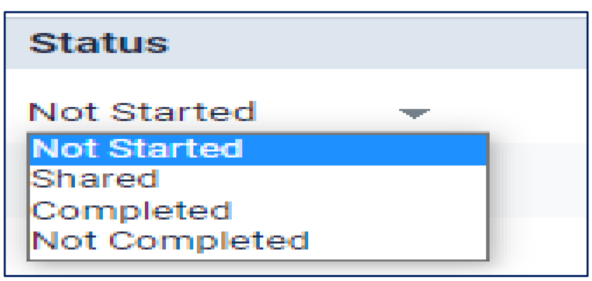
2. Enter the collaborator's **Name** and **Email** address in the respective fields.

   NOTE: The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.



3. Click on the **down arrow** in the **Permission** column and select:

   - **Edit** - if the user will have the ability to edit the document.
   - **Comment** – if the user cannot edit the document but can enter comments about it.
   - **Read Only** – if the user can review the document but cannot edit or enter comments.

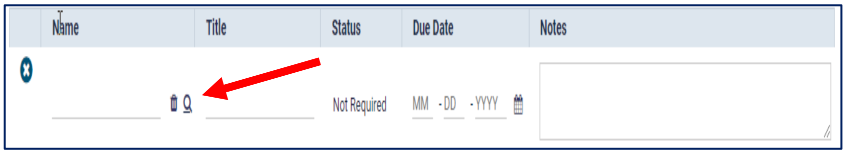


NOTE: The Status column displays Not Started for each user prior to the start of the collaboration. The system will automatically update the status as it changes.

Go to Step 10 to add an Internal Collaborator; otherwise go to Step 11.

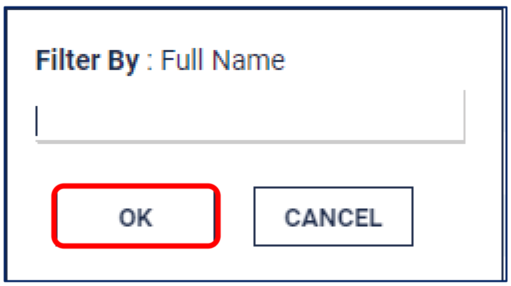
Screenshot	Directions

Step 10: Adding an Internal Collaborator

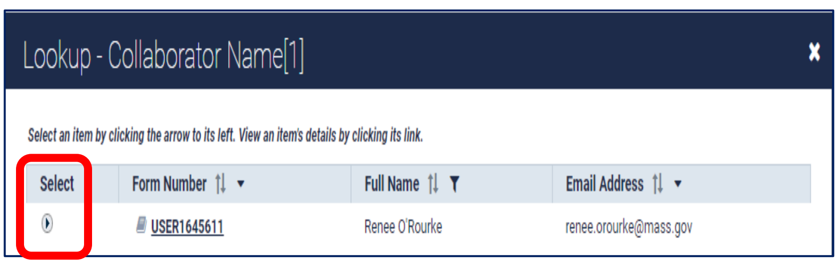


1. Click on the **magnifying glass** search icon.

2. In the **Lookup – Collaborator Name** popup box, if the desired user displays continue with step 4 below; if not, click on the down **triangle** in the **Full Name** column to search for the user by name.

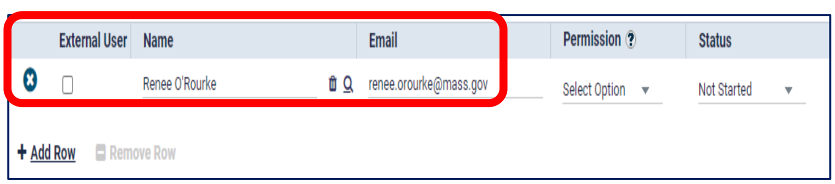


3. In the **Filter By: Full Name** popup box, enter the collaborator's name, then click on the **OK** button.



4. When the **Lookup – Collaborator Name popup** box re-displays, click on the **right arrow** in the **Select** column.

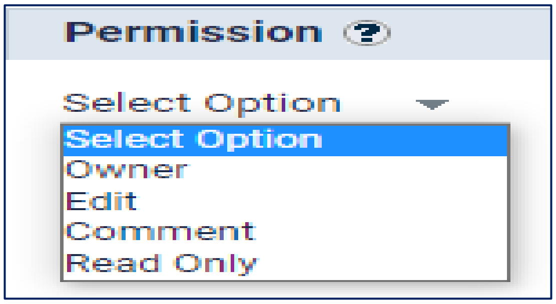
   NOTE: Do not click on the USER hyperlink in the Form Number column.

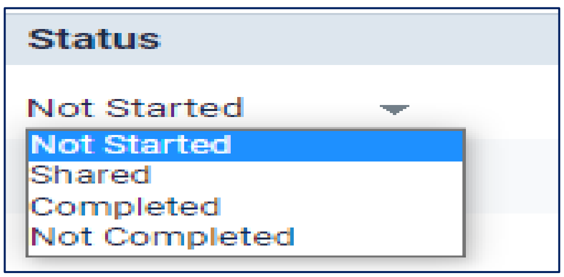


5. The selected internal collaborator's **Name** and **Email** address now display in the respective fields.

   NOTE: The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.

Screenshot	Directions





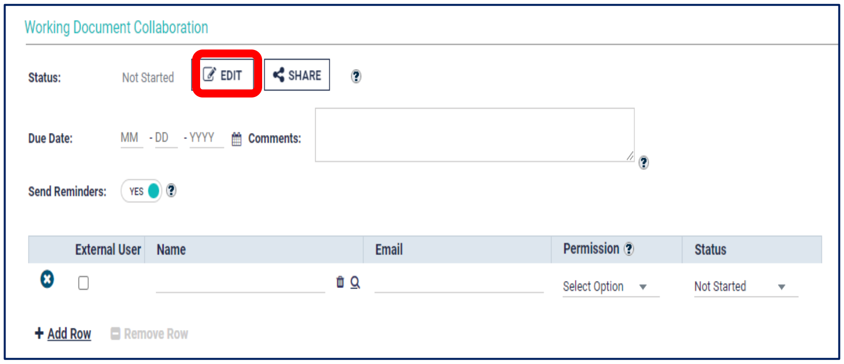
6. Click on the **down arrow** in the **Permission** column and select:

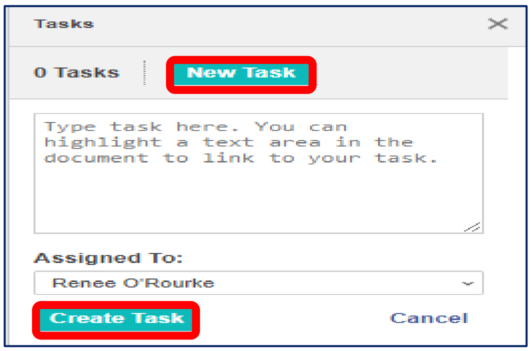
   - **Owner** – The system will automatically designate you as an owner; however if required an additional owner may be assigned.
   - **Edit** - if the user will have the ability to edit the document.
   - **Comment** – if the user cannot edit the document but can enter comments about it.
   - **Read Only** – if the user can review the document but cannot edit or enter comments.

   NOTE: The Status column displays Not Started for each user prior to the start of the collaboration. The system will automatically update the status as it changes.

Step 11: Starting the Collaboration Process

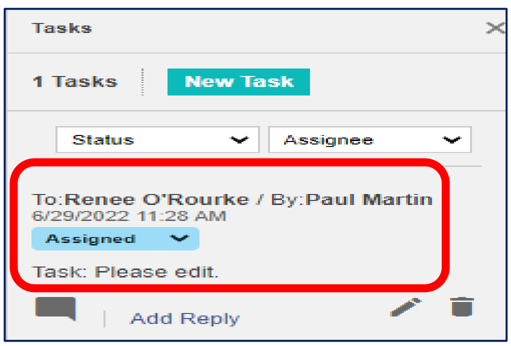
1. Click on the **EDIT** button. Doing so adds your name to the list of collaborators and your in-progress Sourcing Strategy document displays.





2. Click on the **New Task** button on the left side of the page.

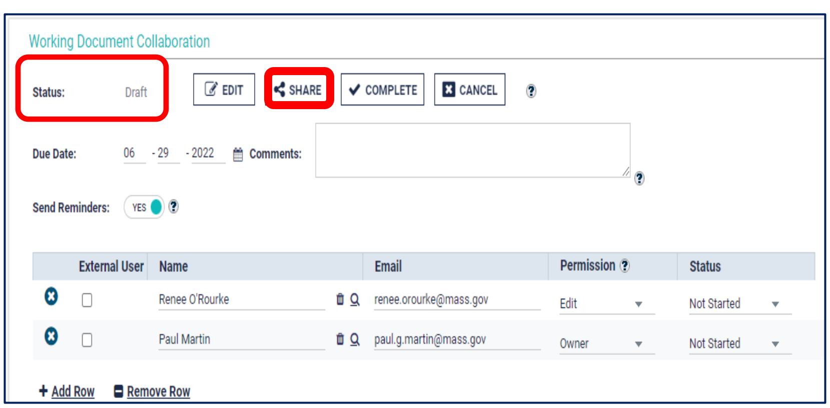
3. When the New Task section redisplays, click in the **text box** and enter a task.



4. Click on the **down arrow** in the **Assigned To:** field and select a collaborator for the assigned task.

5. Click on the **Create Task** button.

   NOTE: The New Task screen re-displays with the entered information.

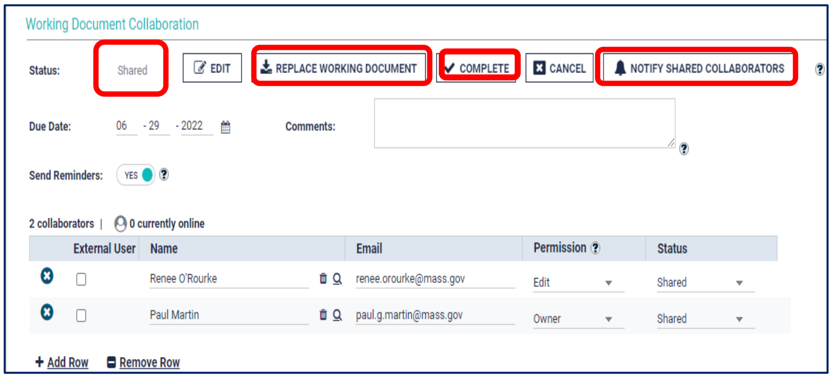


6. Click on the **GO TO RECORD** button at the bottom of the **Strategy Document** page to return to the **Working Document Collaboration** subsection. The status is **Draft.**

7. Click on the **SHARE** button.

Continued on Next Page

Screenshot	Directions

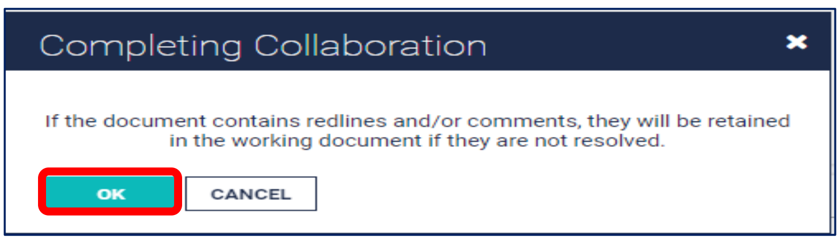


NOTE: The status has now changed to **Shared.** An invitation to edit has been sent to all collaborators. The owner can see if there any collaborators currently in the document.

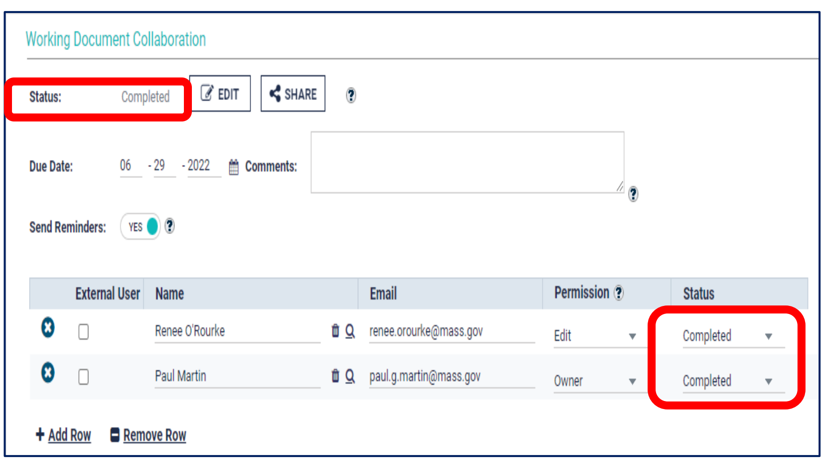
Once Shared, two new buttons appear.

- **Replace Working Document:** If edits were made, you can replace the document in the section above.
- **Notify Shared Collaborators:** will send a reminder to those who haven't completed the review.

8. Click on the **COMPLETE** button once the collaboration is completed and the working document has been replaced.



9. Click on the **OK** button in the **Completing Collaboration** popup box.



10. The status changes to **Completed**.

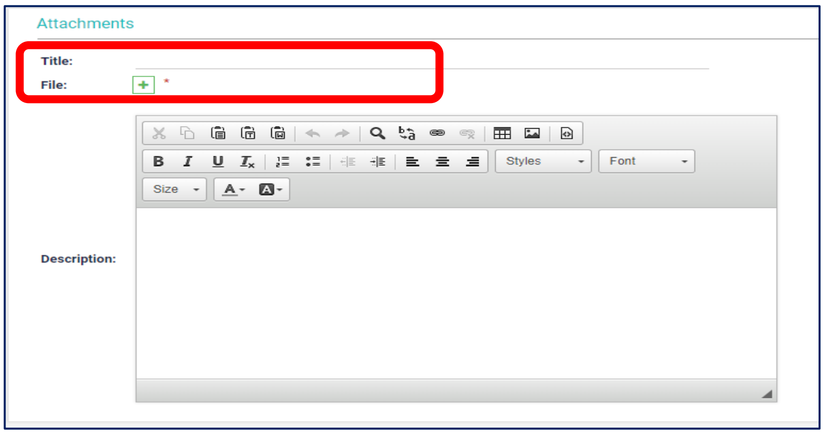
    Now scroll down and click on the **Notes & Attachments** section.

Screenshot	Directions

Step 12: Completing the Notes & Attachments Section

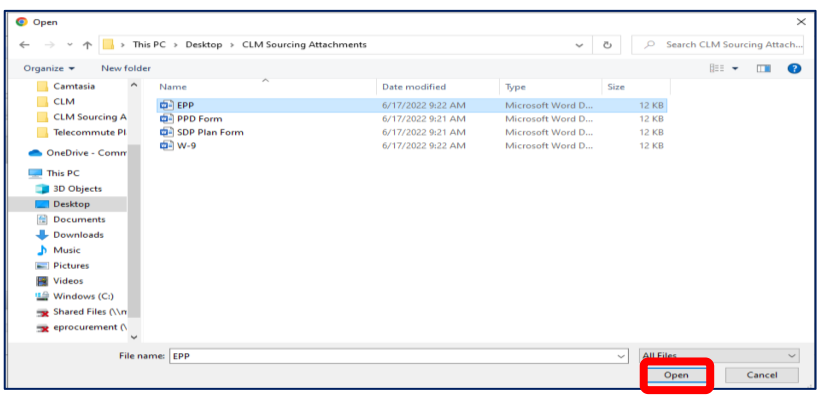
NOTE: This section can be used to attach relevant documents such as the **EPP Process and Project Plan** document.

1. Click on the **ATTACH FILE** button.



2. On the **Attachments** screen, enter the Title of the document to be attached.

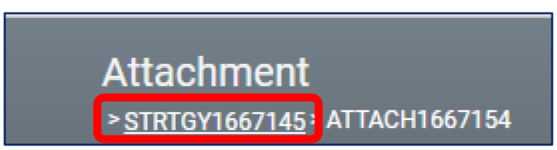
3. Click on the green and white **plus sign** icon.



4. When the Downloads screen displays, go to the location on your computer where you have saved the EPP Process and Project Plan document, select it, and click on the **Open** button. The document name displays in the **File:** field.

5. Add a description if desired in the **Description:** text box.

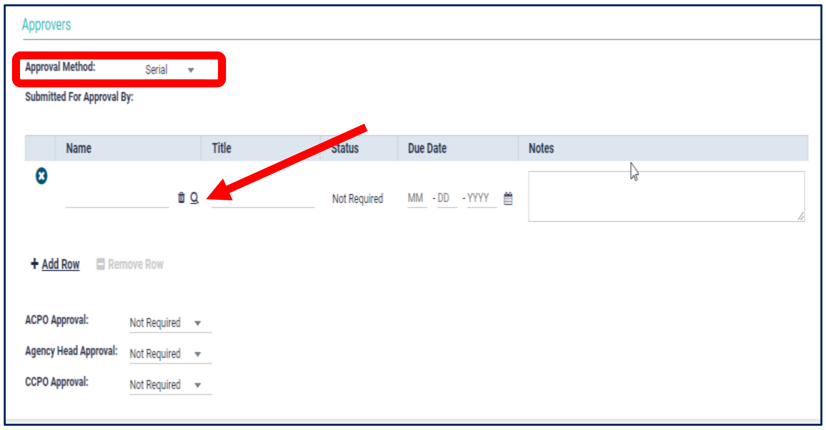
6. Click on the **SAVE** button at the bottom of the page.



7. Click on the STRTGY hyperlink beneath the word Attachment in the title bar at the top of the page to return to the Sourcing Strategy page.

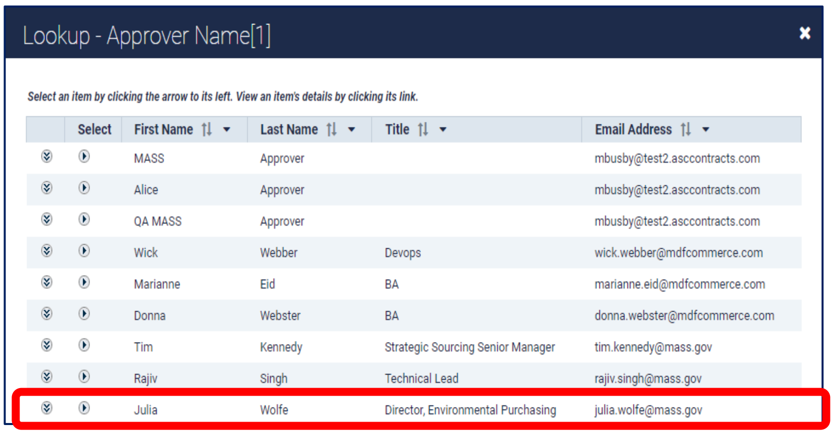
Screenshot	Directions

Step 13: Completing the Approvers Section



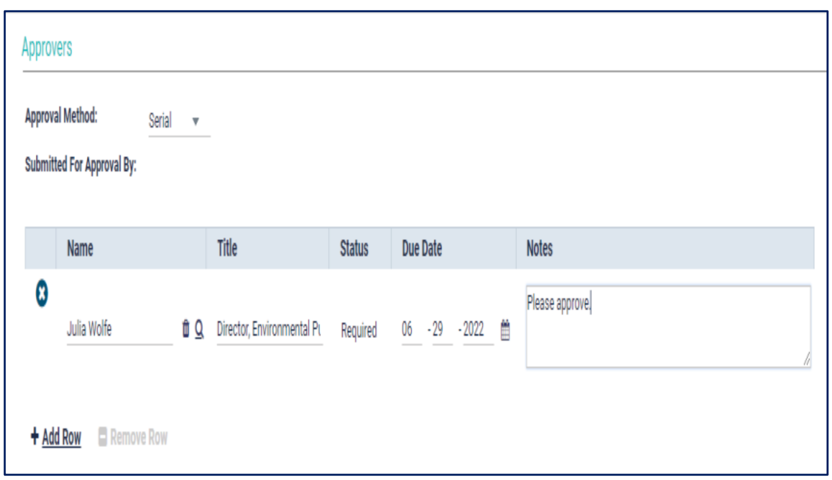
1. Ensure that **Serial** is selected from the dropdown menu in the **Approval Method** field for sequential approvals, or **Parallel** is selected for simultaneous approvals.

2. In the **Submitted For Approval By:** section, click on the **magnifying glass** search icon.



In the **Lookup- Approver Name** popup screen, click on the right arrow in the **Select** column next to the name of your desired approver.

NOTE: Your approver name may also be searched for using the down arrows in **the First Name** or **Last Name** columns.



3. Add a requested due date for approval in the **Due Date** column. Repeat the above steps 1-3 for multiple approvers.

   NOTE: The ACPO, **Agency Head**, and **CCPO** approver fields are not required at this time.

4. Click on the **SAVE** button at the bottom of the page.

5. Click on the **SUBMIT FOR APPROVAL** button at the bottom of the page.

NOTE: Once approval is received, the status changes to **Approved** and you can proceed to create a bid in **COMMBUYS.**