Job Aid:

How to Create a Release Requisition and Purchase Order (Contract Purchase)

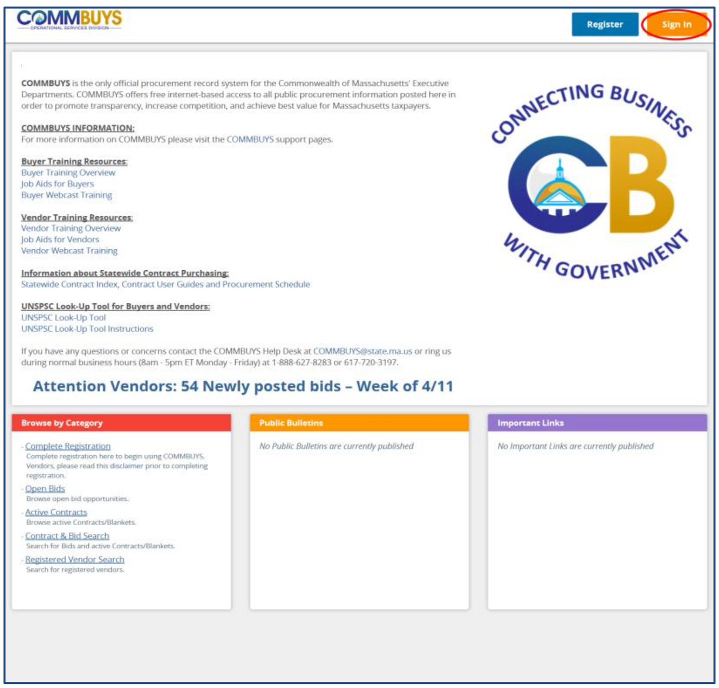
This Job Aid shows how to:

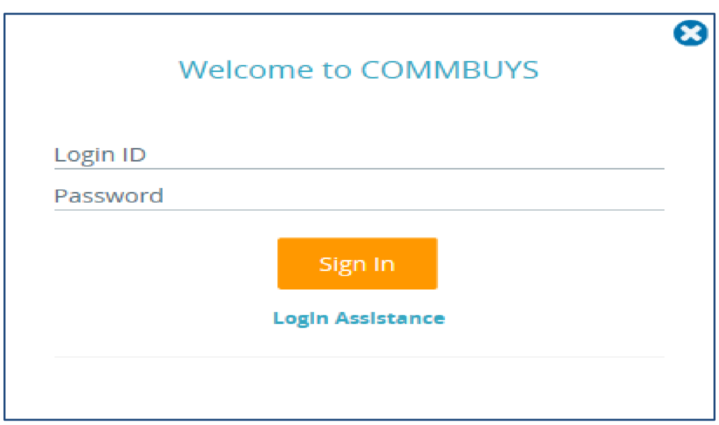
- Create a Release Requisition in COMMBUYS
- Submit the Requisition for approval in COMMBUYS
- Send the Vendor a Release Purchase Order

Of Special Note:

Requisitions are documents used to request goods and services. A requisition is the first document you use to generate a Purchase Order (PO). This job aid will show how to submit a request for goods and services from Statewide Contract (SWC) and Department Contracts. Once the requisition is approved, a PO is generated and can be sent to the vendor. This job aid is for users with the role of Basic Purchaser or Department Access.

Screenshot	Directions





Step 1: Logging in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking the hyperlink COMMBUYS.
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your **Login ID** and **Password** and click the **Sign In** button.

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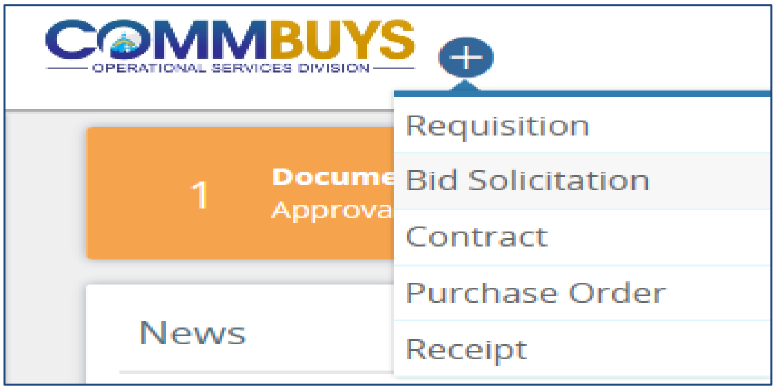
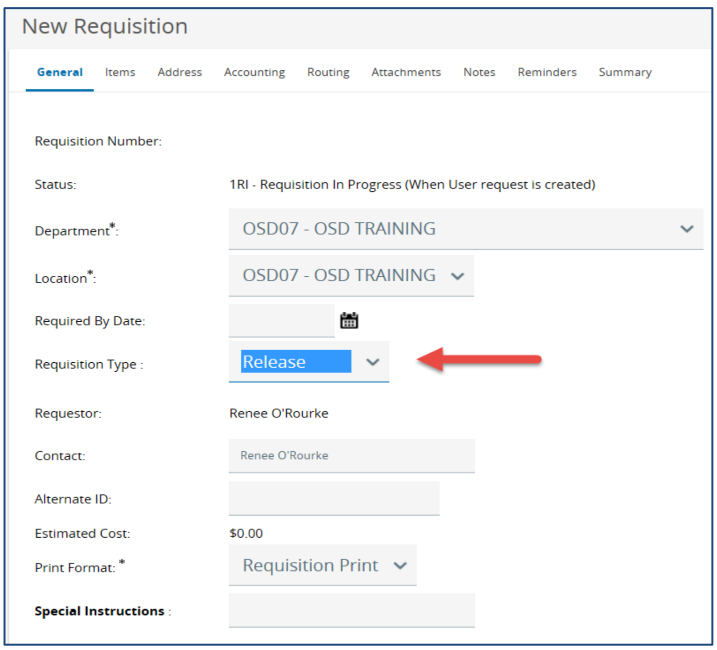


Step 2: Selecting Requisition

1. Click on the **Add Documents** (plus sign) icon.
2. Select **Requisition** from the dropdown menu.



Step 3: Completing the Left Side of the General Tab

The General tab for the requisition opens. On the left side of the screen, complete the following fields: (asterisk fields are required)

- **Department**: defaults from user profile. May be changed, using the dropdown if other departments are available to user.
- **Location**: defaults from user profile. May be changed, using the dropdown if other locations are available to user.
- **Required by Date**: optional
- **Requisition Type**: Release
- **Requester**: user that created the requisition; this field cannot be edited
- **Contact**: contact for this requisition; can be changed
- **Estimated Cost**: calculated by COMMBUYS; not editable by user
- **Alternate ID**: Enter information as required. This may include (but not limited to) data such as Massachusetts Management Accounting and Reporting System (MMARS) encumbrance ID or Enterprise Resource Planning (ERP)/Accounting system transaction numbers for non-MMARS users.
- **Special Instructions**: Enter information as required. This field allows for entry of specific instruction to vendors. If entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. This may include (but not limited to) data such as shipping drop off info, locations, additional contacts, etc.

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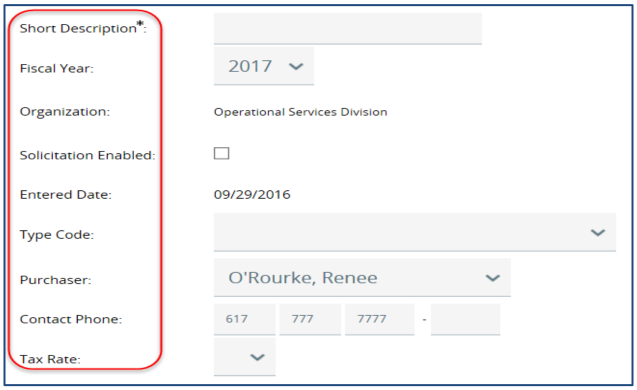
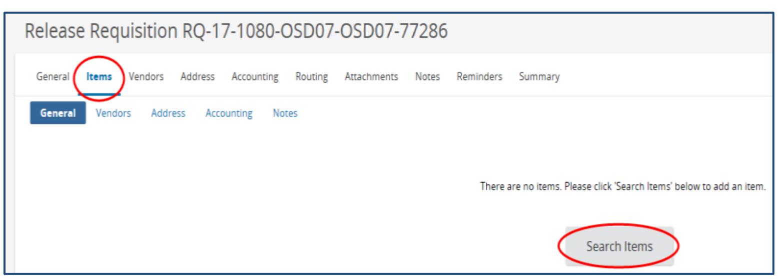


Step 4: Completing the Right Half of the General Tab

On the right half of the **General** tab, complete the following fields:

- **Short Description**: be specific as this field can also be used as search criteria to locate a requisition – can be used as a place for your Department document number
- **Fiscal Year**: defaults to the current Fiscal Year
- **Organization**: default value based on your user profile
- **Solicitation Enabled**: select if this requisition will convert to a bid (request quotes from contract vendors)
- **Entered Date**: defaults to the current date
- **Type Code**: select the most appropriate option from the dropdown list
- **Purchaser**: defaults to users' name; use the dropdown to select a different purchaser
- **Contact Phone**: defaults to user's profile value; can be updated as needed
- **Tax Rate**: N/A for Commonwealth, leave blank.

Click on the **Save & Continue** button at the bottom of the page to save the information entered on the General tab.

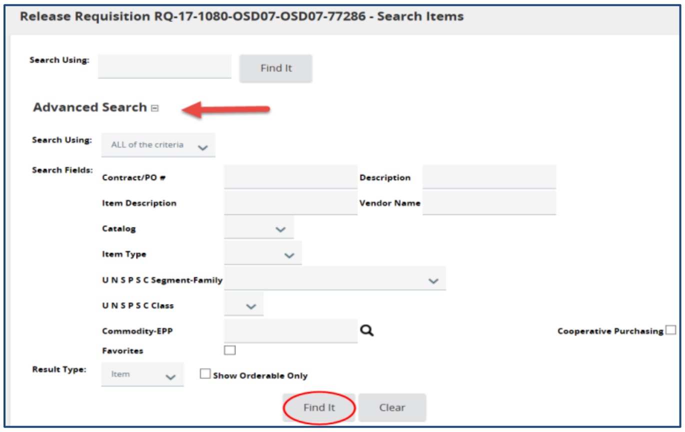


Step 5: Preparing an Item Search

To add items to the requisition, click on the **Items** tab.

Click on the **Search Items** button to begin the process of adding contract goods or services to the requisition.

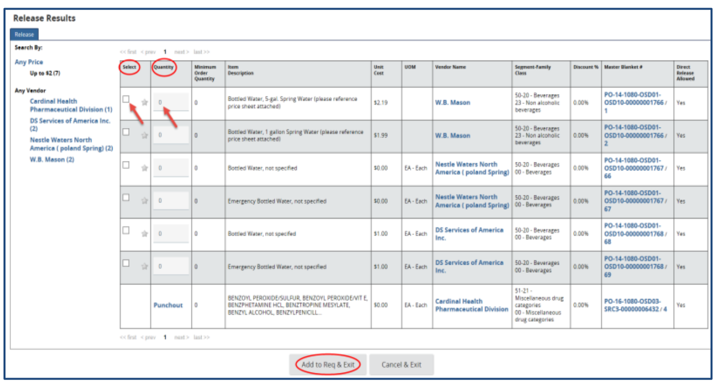
Screenshot	Directions



Step 6: Searching for Items

The item lookup or Search Items page opens. Input the search criteria in the **Search Using** field and click on the **Find It** button.

Or, click on the **plus sign icon (+)** next to **Advanced Search** to open more search fields. Enter the search criteria and click on the **Find It** button to reveal search results**.**



Step 7: Selecting Items

The search results display unit cost, unit of measure (UOM), vendor, etc. for each item.

1. Click on the checkbox next to the desired item in the **Select** column.
2. Enter a number in the **Quantity** field.
3. Click on the **Add to Req & Exit** button located at the bottom of the page.

The search process is the same for a service, although some SWC & Departmental contracts will have the term “conversion vendor” under the vendor name.

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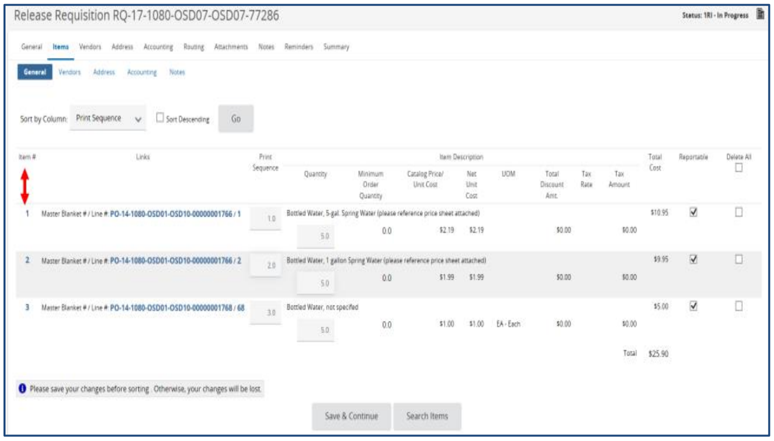


Step 8: Reviewing Item Information

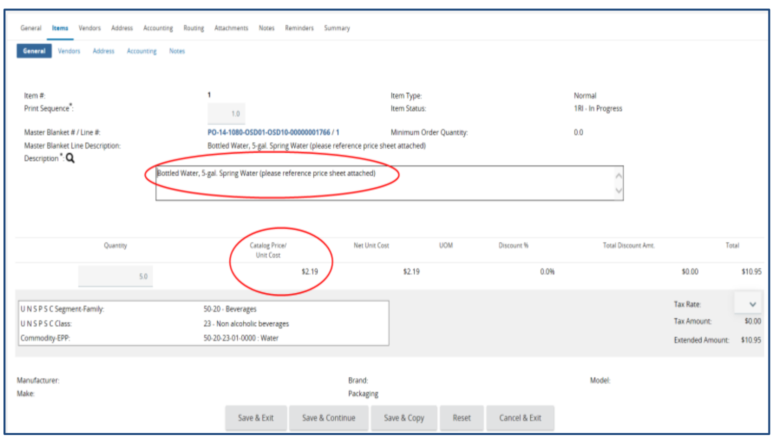
The **Items** tab refreshes with the selected items added to the requisition.

You can click on the blue hyperlink in the **Item #** column on the left side of page to view additional details.

NOTE: The Master Blanket Purchase Order (MBPO) number of the selected item(s) is also included (this is the COMMBUYS Contract number).

If the item you chose had a zero dollar value, click on the **Item #** hyperlink to enter a value.

If the item you chose was on a contract that is set up as a distributor model, you will also be able to enter information by clicking on the Item # hyperlink.



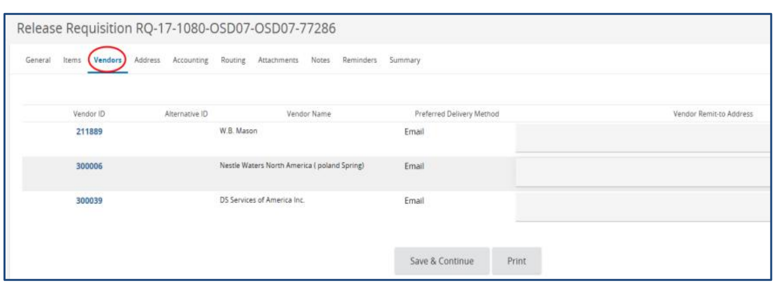
Step 9: Editing Item Information

Clicking a hyperlink opens the Item detail. This is where you have the option to edit the **Description** field.

NOTE: This is important for some contracts where you need to explain the item/service in more detail.

NOTE: Items/services with a $0 unit cost need to be edited to enter a value and item description. Follow instructions on the MBPO in COMMBUYS to obtain item and pricing data.

Click on the **Save & Continue** button or the **Save and Exit** button when finished.



Step 10: Viewing the Vendor Tab

Click on the **Vendor** tab.

This tab contains information about the vendor who will receive the PO and deliver the items. This information is auto populated based on the goods/services selected.

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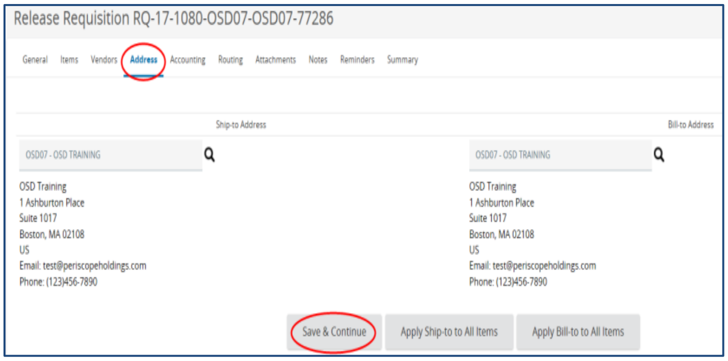


Step 11: Viewing/Editing the Address Tab

Click on the **Address** tab.

The **Address** tab opens. Displayed here is the Ship-to and Bill-to Address that was brought over from your profile.

1. Update the Address page by clicking on the magnifying glass icon if items are being shipped to, or billed to a different address than the default.

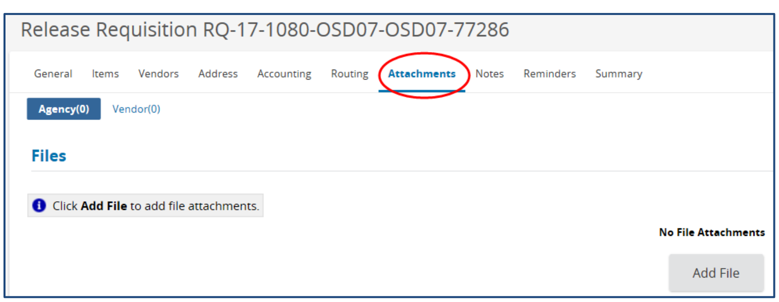
2. If no change is required go to Step 12.

3. If there is an error message indicating that no valid ship-to address exists, click on the magnifying glass icon to select a Ship-to address.

NOTE: If you want the option to ship to multiple addresses, go back to the Items tab and select the Address sub tab.

Click on the **Save and Continue** button if you make any changes

NOTE: The Accounting tab is not currently used in COMMBUYS. The Routing tab is not activated until after you submit the document for approval.



Step 12: Viewing/Editing the Attachments Tab

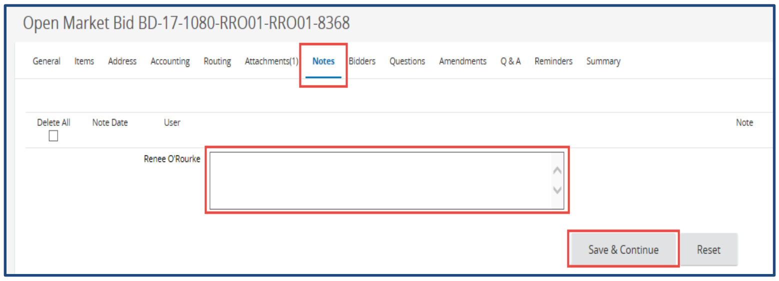
Click on the **Attachments** tab. The **Attachments** tab displays.

If any files automatically attach, review and keep or delete as necessary.

Attachments include bid attachments and required forms/contract documents.

Click on the **Add File** button to add a new file.

Screenshot	Directions



Step 13: Adding Notes

Click on the **Notes** tab if you would like to add a note. Notes are viewable only by Commonwealth users. Vendors cannot access or view these notes.

When complete, click on the **Save & Continue** button.

Step 14: Entering Reminders

1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization.

2. Use the calendar icon in the **Due Date** field to select the date of the reminder, then enter your reminder text in the **Comment** field.

3. Select yourself or another internal recipient in the dropdown menu next to the **Remind Whom** field.

4. If an advanced reminder is desired, enter a number in the **Days Prior to Remind** field.

5. If you would like to receive an email when your reminder is due, click on the **Send Email** checkbox.

6. When complete, click the **Save & Continue** button.

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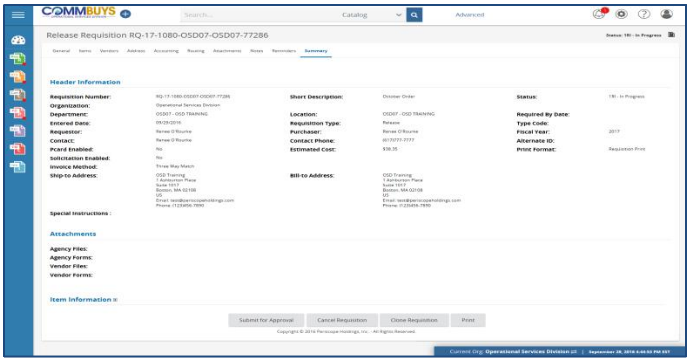	**Step 15: Viewing the Summary Tab** 1. Click on the **Summary Tab** to view a summary of the nearly completed requisition. 2. Review the Summary page information. Shown here is the lower part of the **Summary** tab that provides a summary of each item on the requisition as well as the action buttons currently available for the requisition. They are: • **Submit for Approval** • **Cancel Requisition** • **Clone Requisition** • **Print** 3. Click on the **Submit for Approval** button to submit the requisition into workflow for approval.
	Step 16: Submitting for Approval Select the appropriate approval path. The approval path displays or you're given the option to select the appropriate one. Click on the **Save & Continue** button to complete. **NOTE**: The requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS and continue with the next step. . Click on the **Save and Continue** button.

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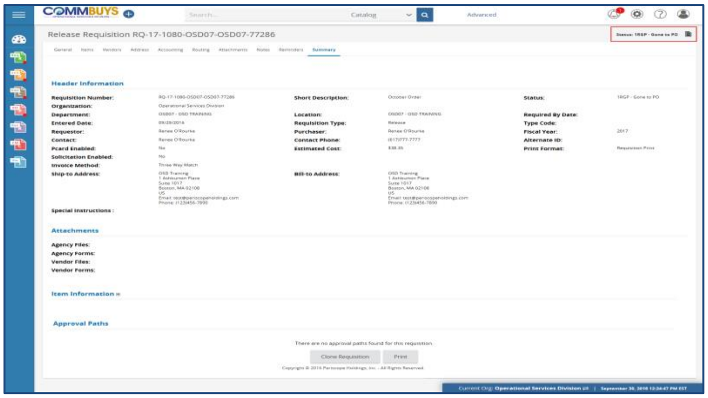
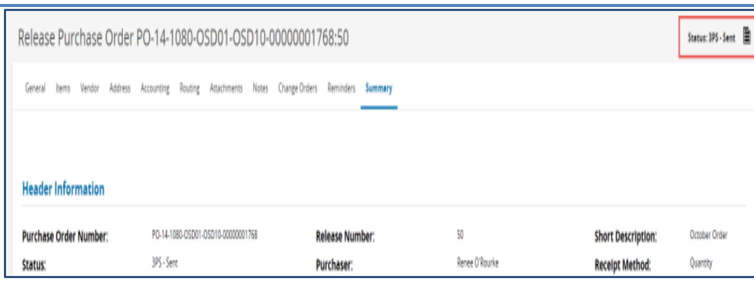


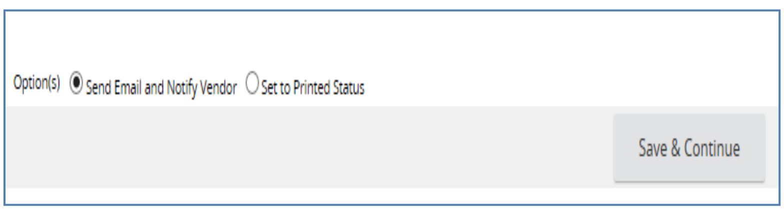
Step 17: Viewing the Summary Tab After Approval

The requisition **Summary** tab redisplays. The status has been updated to:

- Status 1RRA – **Ready for Approval** or 1RGP - **Gone to PO**.

NOTE: For Department Access and some Basic Purchasing users the process ends at this step - the submission of the release requisition into workflow for approval. This will depend upon your agency / department purchasing workflow approval process.





Step 18: Completing the PO

Direct Release POs will automatically send after the requisition has been approved.

If you purchased off of a Standard Release contract that is set up as a Distributor Model or is Solicitation Enabled, OSD recommends following the "*How to Create a Solicitation Enabled Bid using a Release Requisition"* job aid which is in the COMMBUYS Purchase Orders section of the job aid page.

If you did not have a direct release purchase order and your PO is in **Ready to Send** status, scroll to the bottom of the page and click on the **Save & Continue** button.