Job Aid:
How to Create a WTO Notice of Intent and Bid Solicitation in COMMBUYS/CLM

This Job Aid shows how to:

- Create a World Trade Organization (WTO) Notice of Intent in CLM and follow up with a Request for Response (RFR) bid solicitation.

Of Special Note:

- In compliance with the WTO's Agreement on Government Procurement (AGP), departments seeking goods and services including human and social services valued at more than $498,000 or construction valued at more than $7,008,000 must post either:

  a) Full Bid documents and materials for at least 40 days prior to the Bid Opening Date, or
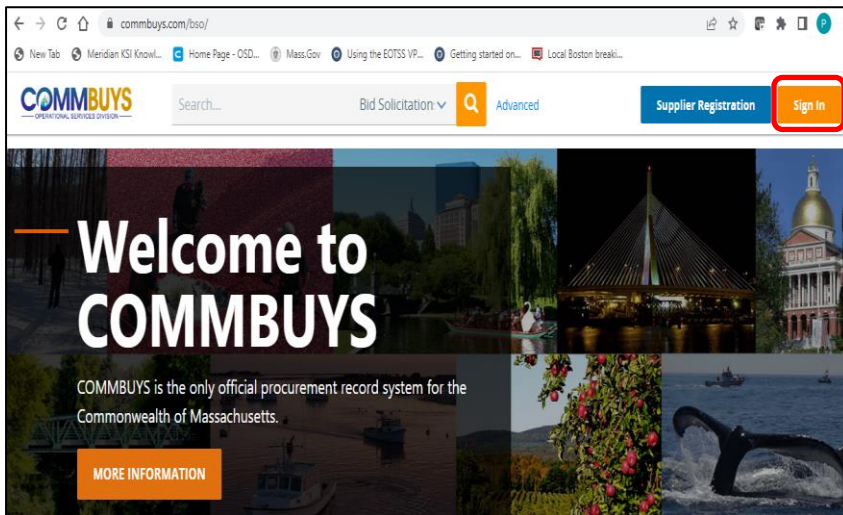
  b) An Intent to Post notice with a later amendment to add the full bid documents and materials for a combined period of at least 40 days prior to the Bid Opening Date. This is a two-step process:

  This job aid covers Part b) above.

- CLM is only available to Executive Agencies.

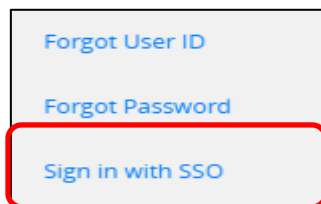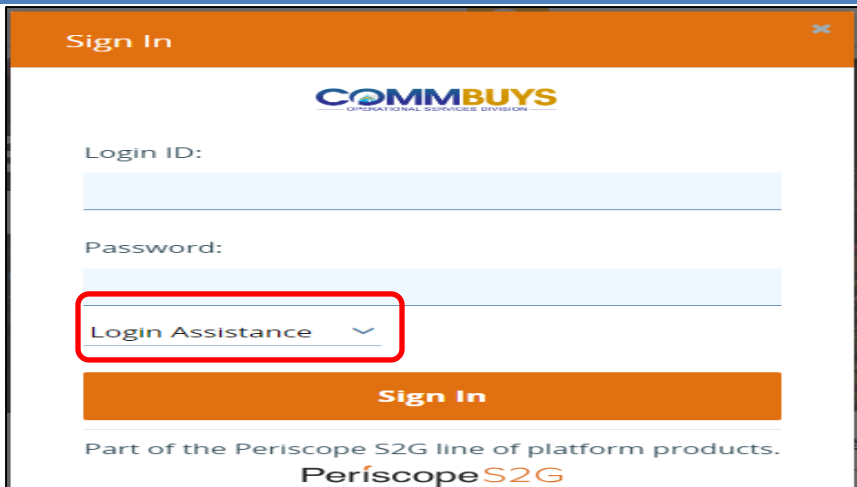| Screenshot	Directions
	Step 1: Logging into COMMBUYS/CLM 1. Log into COMMBUYS/CLM by entering **commbuys.com** into the URL address box of your browser. 2. When the COMMBUYS Landing Page displays, click on the gold and white **Sign In** button at the top right of the page.

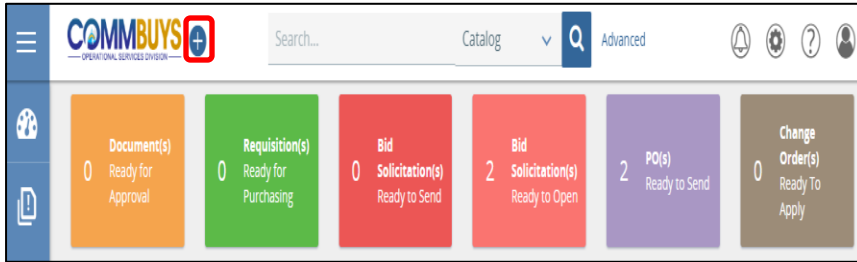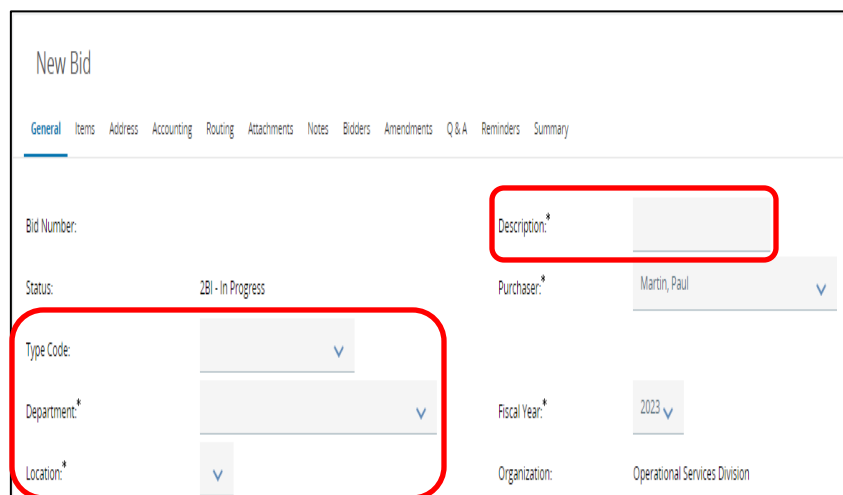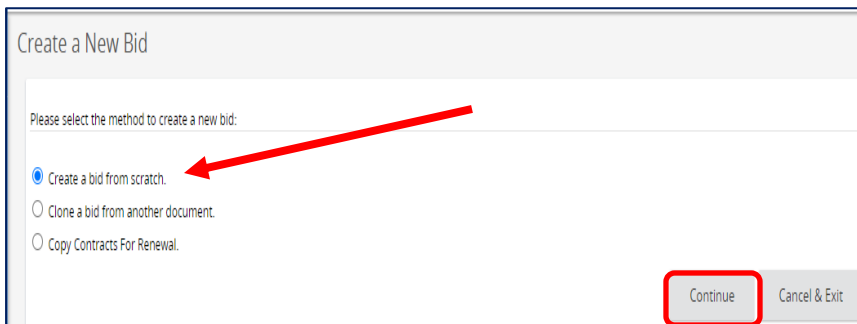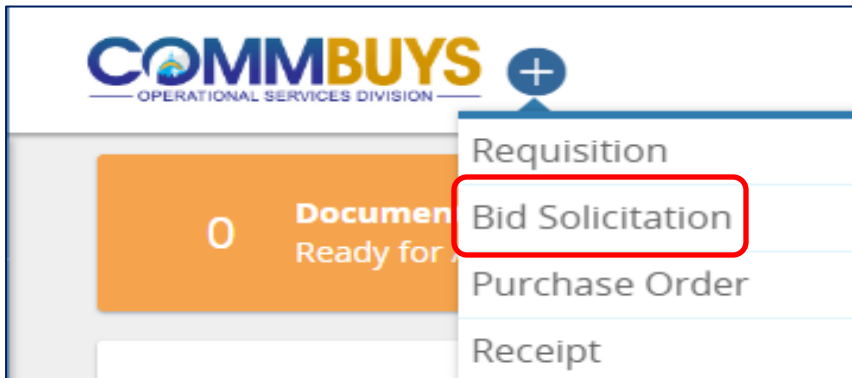| Screenshot	Directions
	3. When the Sign In page displays, click on the **down arrow** next to Login Assistance.
	4. Select Sign in with SSO from the dropdown menu.
	5. Enter your Commonwealth **Email address** and **Password**, then click on the **Continue** button. **NOTE:** Use the **Forgot password?** hyperlink if needed and COMMBUYS/CLM will send a password email to your email address.

Screenshot	Directions
	Step 2: Selecting Bid Solicitation
	1. When your COMMBUYS home page displays, click on the **Add Documents** blue and white plus sign icon.
	2. Select **Bid Solicitation** from the dropdown menu.
	3. Ensure that the radio button for **Create a bid from scratch** is selected then click on the **Continue** button.
	Step 3: Completing the General Tab Page
	1. Fields to complete on the top portion of the page include:
	Description*: (upper right-hand side of the page) – Enter a description of the bid solicitation.
	NOTE: This is a searchable field, so use unique language that would allow you to locate this transaction at a later time. This is also the headline for vendor notifications so it should be pertinent to vendors.
	Type Code: (left side) - Using the dropdown arrow, select one of the following:

Screenshot	Directions
	• **NS**: Bid for a non-statewide (departmental) solicitation • **SS**: Bid for a statewide solicitation – **for OSD use only.** **Department***: (left side) - Click on the down arrow next to the field and select the desired department. **Location*:** (left side) - Click on the down arrow next to the field and select the desired location. **Available Date***: (left side) - Enter the date the bid (solicitation) will be made available for vendors to view and submit quotes. Click on the calendar icon to set the desired month, day, and time (using the slide bars). **Bid Opening Date*:** (right side) - Enter the date that quotes will no longer be accepted and submitted quotes can be opened for viewing. Click on the calendar icon to set the desired month, day, and time (using the slide bars). **NOTE:** If the year must be changed, select the desired year before selecting the month, day, and time. **Purchase Method*:** (left side) – Ensure that **Open Market** is selected.

Screenshot	Directions

Screenshot

Directions

Fields to complete on the bottom portion of the page include:

SBPP (Small Business Purchasing Program) Eligible?* – If displayed, select **Yes** from the dropdown menu if the transaction will likely total $250K or less annually. Select **No** if over $250K or if not applicable.

Procurement Type: Use the dropdown menu to select **World Trade Notification.**

2. Click on the **Save and Continue** button. **NOTE:** A red validation error message displays **No Items.**

NOTE: COMMBUYS autogenerates an **Open Market Bid** number at the top of the page, the status displays as **In Progress**, and a **Create CLM RFX** hyperlink displays to the right of the **CLM_rfx_type** field at the bottom of the page.

3. Click on the **Create CLM RFX** hyperlink.

4. Click on the **OK** button in the popup box. **NOTE:** After a few seconds of processing, COMMBUYS autogenerates a **BIDPKG** number in the **CLM RFX ID:** field.

5. Click on the **Save & Continue** button.

6. After a few seconds of processing, click on the **View** hyperlink next to the BIDPKG number in the **CLM RFX ID** field.

NOTE: You are now redirected into CLM in **Bid Package (Intent) Preparing** mode with a BIDPKG number at the top of the page

Screenshot	Directions

Screenshot | **Directions**

Step 4: Completing the Sourcing Strategy Details Section

1. If you have created a Sourcing Strategy, click on the **magnifying glass search icon** next to the **Document Number** field.

2. When the Lookup Document Number page displays, identify the Sourcing Strategy in the **Form Number** column and click on the **circled arrow** in the **Select** column.

3. If you have not prepared a Sourcing Strategy, skip to the **Bid Package Details** section in Step 5.

Screenshot	Directions
Bid Package Details COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929 Predecessor Bid Package: 🔍 Title: WTR01 Commercial and Recreational Watercraft Description / Scope: Commercial and recreational watercraft products and services. Type: **(*)** ▼ *WTO * Agency: Operational Services Division - 1080 Business Unit: OSD TRAINING - OSD07 Contract Type: Blanket Purchase Agreement ▼ * Estimated Amount: 1,000,000.00 SWC #: WTO01 Notice Type: ⦿ Goods & Services ◯ Construction ◯ HHS/POS *	**Step 5: Completing the Bid Package Details Section** 1. If not auto filled, enter the title of the contract in the **Title** field. 2. If not auto filled, enter the contract description in the **Description/Scope** field. 3. The **Type** field displays ****(*)**** in the left box and **WTO** in the right box. 4. Click on the **down arrow** in the **Contract Type** field and select **Blanket Purchase Agreement** from the dropdown menu. 5. If not auto filled, enter the expected amount of the contract in the **Estimated Amount** field. 6. Enter the contract number in the **SWC #** field. (OSD only) 7. Select the appropriate radio button in the **Notice Type** field.
Goods and Services Details Purchase Type: Select Option ▼ Select Option Term One Time **Goods and Services Details** Purchase Type: Term ▼ Term Type: ⦿ Dates ◯ Duration * Term Start Date: YYYY - MM - DD 📅 Term End Date: YYYY - MM - DD 📅	**Step 5: Completing the Goods and Services Details Subsection** 1. If Goods & Services has been chosen in the Notice Type field above, click on the **down arrow** in the **Purchase Type** field and select **Term** from the dropdown menu. 2. Select the radio button for **Dates** in the **Term Type** field. 3. Enter the date that the contract will begin in the **Term Start Date** field. 4. Enter the date that the contract will end in the **Term End Date** field. **NOTE:** The calendar icon can also be used to enter these dates.

Screenshot	Directions

Screenshot

Bid Package Dates

Planned Contract Start Date: 12 - 29 - 2023 * 🗓

Timeline

Intent to Procure Date:	08	- 17	- 2023	❓ 🗓
Issue Date:	08	- 24	- 2023	🗓
Pre-Bid Conference Date:	09	- 06	- 2023	🗓
Questions Acceptance Deadline:	09	- 10	- 2023	🗓
Questions Answered Date:	09	- 12	- 2023	❓ 🗓
Bid Amendment Deadline:	09	- 17	- 2023	🗓
Online Bid Submission Training:	10	- 02	- 2023	🗓
Closing Date:	10	- 22	- 2023	🗓
Presentation for Selected Bidder(s):	MM	- DD	- YYYY	🗓
Announcement of Awarded Bidder(s):	12	- 07	- 2023	* 🗓
Final Negotiation Date:	MM	- DD	- YYYY	🗓
Completion of Online Catalogs:	MM	- DD	- YYYY	❓ 🗓

Directions

Step 6: Completing the Bid Package Dates Section

If not auto filled, enter the start date of the contract in **Planned Contract Start Date** field. Most fields in the **Timeline** subsection will auto fill with a recommended schedule of dates. These dates are changeable. The following fields can be entered when appropriate but are not available for all contracts.

- **Presentation for Selected Bidders**

- **Final Negotiation Date**

- **Completion of Online Catalogs**

NOTE: The next section – **Bid Package Documents** requires no entry at this time. Go to **Step 7.**

Screenshot	Directions
Statewide Contract Dates Effective Date: 12 - 29 - 2023 * Initial End Date: MM - DD - YYYY Renewal: None ▾ Renewal: Options ▾ Option Period | Duration (months) | Start Date | End Date 1 | | MM - DD - YYYY | MM - DD - YYYY + Add Row ⊟ Remove Row	**Step 7: Completing the Statewide Contract Dates Section** **NOTE: Despite the title, this section applies to non-statewide contracts as well.** 1. If the **Effective Date** does not auto fill enter the beginning date of the contract.. Using the fields or the calendar icon, enter the **Initial End Date.** 2. In the **Renewal** field, if there are no renewals, leave the default as **None.** **NOTE**: Expiration dates on contracts may not be extended unless renewal options have been included in the Request for Response or Due Diligence Notice of Intent. To add renewal information: • Click on the **down arrow** next to the field and select **Options** from the dropdown menu. The **Option Period** column defaults to **1.** • Enter the **length of the renewal** in the **Duration (months)** column. **NOTE:** Entering a number in this field will populate the next two fields. • Enter the **Start Date** if not populating the Duration (months) field. • Enter the **End Date** if not populating the Duration (months) field. • Click on the **Add Row** hyperlink to add additional renewal periods.
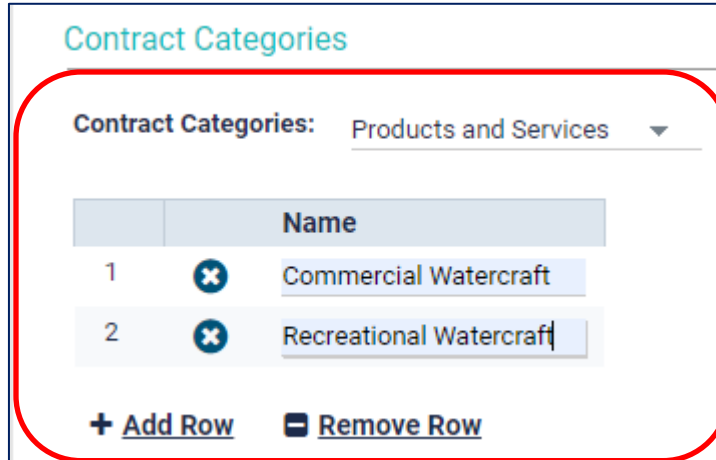
Screenshot	Directions

Screenshot

Directions

Step 8: Completing the Contract Categories Section

If the **Contract Categories** and **Name** fields do not auto fill, select the type of category from the dropdown menu in the **Contract Categories** field, and enter the name of the categories in the **Name** field. Use the **Add Row** feature if more than one category is being entered.

Screenshot	Directions

	Step 9: Completing the Contacts Section.

Contacts

Requestor: _____

Sourcing Manager: _____ *Field is mandatory Q

1. Leave the **Requestor** field blank and click on the **magnifying glass** search icon next to the **Sourcing Manager** field

Lookup - Sourcing Manager

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

	Select	Full Name ⇅ ▾		Email Address ⇅ ▾

2. In the **Lookup – Sourcing Manager** popup screen, click on the **down (triangular) arrow** in the **Full Name** column.

Filter By : Full Name

_____

[OK] [CANCEL]

3. Enter the desired name in the **Filter By: Full Name** popup screen and click on the **OK** button.

Lookup - Sourcing Manager ✕

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

	Select	First Name ⇅ ▾	Last Name ⇅ ▾	Email Address ⇅ ▾
⊗	◉	Paul	Martin	paul.g.martin@mass.gov

4. When the **Lookup – Sourcing Manager** popup screen re-displays, click on the **right arrow** in the **Select** column for the desired name.

Contacts

Requestor: _____

Sourcing Manager: Paul Martin *Field is mandatory. Q

5. When the page re-displays, the desired name will display in **the Sourcing Manager** field.

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

Screenshot	Directions

Step 10: Completing the RFR Document/Working Document Subsection

1. Click on the **Template** hyperlink in the **Document** field, then click on the **.docx** box that displays on the corner of your screen and open.

2. When the template displays, click on the **Enable Editing** button on the yellow stripe at the top, and review and edit the template wording as needed.

3. Scroll down to the **UNSPSC chart,** add the relevant **UNSPSC Codes** and **descriptions** to the table, then delete the rest.

4. When editing is complete click on **File** on the top task bar, then **Save As**, and click on the **Save** button.

5. Click on the **X** at the top right of the Notice of Intent page to close it.

6. When the page redisplays, click on the **Upload Document** hyperlink.

7. Select the edited and renamed NOI document from the saved location popup screen then click on the **Open** button on the popup screen. The edited and renamed document now appears in the **Document** field.

8. The **Data Injection** field defaults to **Yes** which is the recopmmended default.

9. Enter comments in the **Comments** field if desired, then click on the **SAVE** button at the bottom of the page. This hyperlinks the NOI in the **Documents** field.

10. Click on the **SEND LETTER OF INTENT** button at the bottom of the page.
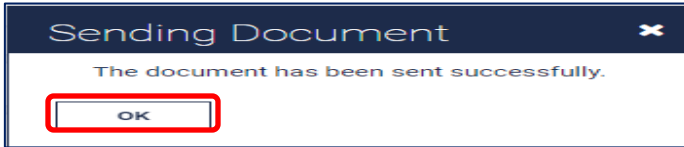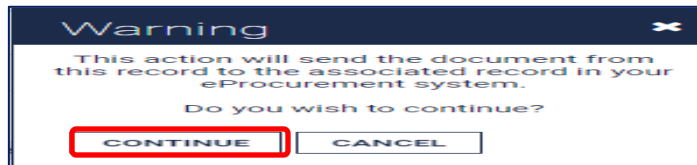
Screenshot	Directions
	11. Click on the **CONTINUE** button on the **Warning** popup screen. 12. After a few moments of processing, click on the **OK** button on the **Sending Document** popup screen. **NOTE:** At this point, you will return to **COMMBUYS** to reopen the bid.
	Step 11: Reopening the Bid in COMMBUYS 1. Click on the **COMMBUYS** tab at the top of the screen. If your Bid displays, go to **Step 12.** 2. If not, click on the COMMBUYS logo to display your COMMBUYS homepage. 3. Click on the **Bid Solicitation** hyperlink in the **Document #** column **of the Recent Documents** section. The bid opens to the **Summary** tab page.
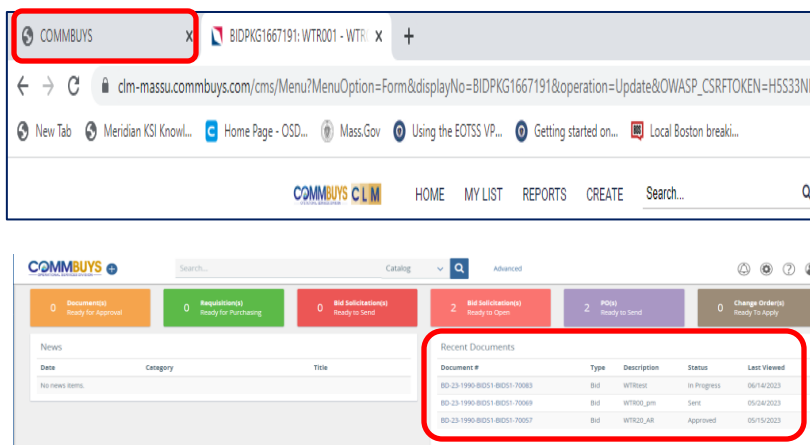
Screenshot	Directions

Screenshot

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Overall Validation Errors

No items.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

There are no items. Please click 'Search Items' or 'Add Item' below to add an item.

Search Items   Add Item   Upload Items   Export Items

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Item #:   Item Type: Normal

Print Sequence*:   1.0   Item Status: 2BI - In Progress

Description*: 🔍 Commercial watercraft products and services.

Disable Pricing On Quote	Quantity	Unit Cost	Net Unit Cost	UOM
☑	0.0	0.00	$0.00	EA

U N S P S C Segment-Family: 25-11   25-11 - Marine transport   🔍

U N S P S C Class: 15   15 - Commercial marine craft

Commodity-EPP: 🔍

Additional product information ▸

Save & Add New   Save & Exit   Save & Continue   Reset   Cancel & Exit

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Directions

Step 12: Completing the Items Tab

NOTE: If the Notice of Intent was successfully sent, the **Attachments** tab displays a **(1)** indicating that the NOI was received by COMMBUYS when sent from CLM.

1. Click on the **Items** tab.

2. Click on the **Add Item** button.

3. Enter a description of the bid in the **Description** field. **NOTE:** If you have multiple categories, enter the name of the first category.

4. Select the **Disable Pricing on Quote** checkbox.

5. Change the **Quantity** field to **1.0.**

6. Enter the 4-digit UNSPSC (United Nations Standard Products and Services Code) in the **UNSPSC Segment-Famil**y field.

   NOTE: This code can be searched for by clicking on the **magnifying glass search icon.**

7. Enter the 2-digit UNSPSC Class code in the **UNSPSC Class** field.

8. If you have additional items, click on the **Save & Add New** button; otherwise click on the **Save & Exit** button.

Screenshot	Directions

Step 13: Completing the Bidders Tab

1. Click on the **Bidders** tab.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General   Items   Address   Accounting   Routing   Attachments(1)   Notes   Bidders   Questions   Amendments   Q & A   Reminders   Summary

General   Address   Accounting   Attachments   Notes   Questions

2. Click on the **Lookup & Add Vendors** button on the bottom of the page.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General   Items   Address   Accounting   Routing   Attachments(1)   Notes   Bidders   Questions   Amendments   Q & A   Reminders   Summary

General   Subcontractors   Quote Activity

Vendor Validation Warnings
No bid bidder.

Select bidder participation, open or closed, and select vendors to notify
○ Unrestricted bid, all vendors can view and respond
○ Restricted bid, only selected vendors can view and respond

Vendor ID   Vendor Name   Vendor Address

☐ Show Estimated Total To Vendors
☐ Show Unit Prices to Vendors
☑ Hide Bid Holder List on Vendor Side
ⓘ Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue   Lookup & Add Vendors

3. Scroll to the bottom of the **Lookup & Add Reference Vendors** popup screen and click on the **Find Vendors for All Commodity-EPPs on the Bid** button.

COMMBUYS | UAT - Lookup Vendors - Google Chrome
test.commbuys.com/bso/bid/lookupBidVendors.sdo?external=true&docId=BD-22-1080-OSD07-OSD07-75929&parentUrl=%2Fbso%2Fbid%2FbidBidd...

Business Enterprise (for profit)
Non-Profit Organization

DUNS Number   This is the DUNS number assigned to my Business

Environmentally Preferable Product   No
                                         Yes

Geographical Service Area in Massachusetts   Western Massachusetts
                                             Central Massachusetts

Prompt Pay Discount   No
                                         Yes

Supplier Diversity and Small Business Status   Disability-Owned Business Enterprise (DOBE)
                                               LGBT-owned Business Enterprise (LGBTBE)

Program ☐ Small Business Purchasing Program

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
             0 1 2 3 4 5 6 7 8 9 10

Find It   Clear

Find Vendors for All Commodity-EPPs on the Bid   Close Window

4. Select all Vendors by clicking on the **Select** checkbox at the top of the **Select** column. **NOTE:** This is the recommended best practice.

Lookup & Add Reference Vendors - Bid BD-22-1080-OSD07-OSD07-75929

Vendor Lookup ⊞

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date
☐					
☐	00039150	All American Marine, Inc.			Jun 19, 2019
☐	00012129	Apollo Fishing LLC			May 28, 2015
☐	00049894	Armstrong Consolidated LLC			
☐	00012981	Armstrong Marine, Inc.			
☐	00048227	Artisan Boatworks			Jun 28, 2022
☐	00002105	ATLANTIC BOATS INC		Jun 28, 2022	Jun 27, 2022

5. Click on the **OK** button in the popup box.

www.test.commbuys.com says

Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

OK

6. Click on the **Save & Exit** button at the bottom of the page. **NOTE:** The page re-displays with the list of selected vendors.

7.

Step 14: Completing the Summary Tab

1. Click on the **Summary** tab.

2. Click on the **Submit for Approval** button at the bottom of the page.

3. Click on the Save & **Continue** button. **NOTE:** The status changes from **In Progress** to **Ready for Approval.**

4. After approval is received, log back into COMMBUYS and click on the red **Bid Solicitation(s) Ready to Send** tile box.

5. Click on the blue hyperlink for the desired bid in the **Bid Solicitation#** column. The bid opens to the **Summary** page.

6. In the **Send Bid Actions** section at the bottom of the page, ensure that the radio button for **Change bid status to "Sent" and notify vendors** is selected,

7. Click on the **Send Bid** button. The bid will be sent on the previously-set Bid Available Date.

8. When the list of vendors displays, click on the **OK** button at the bottom of the page.
   NOTE: The status changes to **Sent.**

   Now, click on the BIDPKG tab at the top of the page to return to the CLM BIDPKG.

Screenshot	Directions

Screenshot

Bid Package Details

COMMBUYS ID:	BD-22-1080-OSD07-OSD07-75929
Predecessor Bid Package:	🔍
Title:	WTR01 Commercial and Recreational Watercraft *
Description / Scope:	Commercial and recreational watercraft products and services. *
Type:	**(*)** ▼ *WTO *
Agency:	Operational Services Division - 1080
Business Unit:	OSD TRAINING - OSD07
Contract Type:	Blanket Purchase Agreement ▼ *
Estimated Amount:	1,000,000.00
SWC #:	WTR01
Notice Type:	⦿ Goods & Services ◯ Construction ◯ HHS/POS *

Directions

Step 15: Completing the Bid Package Details Section

1. Click on the down arrow in the **Type** field containing the asterisks and select **Request for Response** from the dropdown menu.

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

NOTE: Now that the WTO Notice of Intent has been posted, it will ultimately be superseded with the Bid Solicitation (RFR). The following steps address replacing the WTO Notice of Intent with the RFR beginning in the RFR Document section.

Step 16: Completing the RFR Document/Working Document Subsection

1. Go to the RFR/Working Document subsection and click on the checkbox next to **Remove.**

2. Click on the **SAVE** button at the bottom of the page, then click on the **COMPLETE** button at the bottom of the page This will remove the prior WTO NOI document and replace it with the RFR template.

3. Click on the Template hyperlink, then click on the **.docx** box on the corner of your screen and open.

4. When the document displays, click on the **Enable Editing** button and edit the template.

5. After editing, click on **File** and **Save As**.

6. Click on **Save**.

7. Click on the **X** at the top right of the screen to close the document.

8. When the page re-displays, click on the **Upload document** hyperlink.

9. Select the edited RFR document from the popup screen and click on the **Open** button. The edited document title now displays in the Document field.

   NOTE: Leave the **Data Injection** field set to **Yes** and enter comments in the **Comments** field if desired.

10. Click on the **Save** button at the bottom of the page.

Screenshot	Directions

Step 17: Completing the Working Document Collaboration Subsection

NOTE: At various stages in the **Contract Lifecycle Management** process, collaboration occurs among members of Strategic Sourcing Teams (SSTs).

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. **NOTE:** Reminders will be sent 7 days and 2 days prior to those collaborators who have not completed the collaboration.

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

- To add an external collaborator, go to **Step 18.**

- To add an internal collaborator, go to **Step 19.**

Working Document Collaboration

Status: Not Started [EDIT] [SHARE] (?)

Due Date: MM - DD - YYYY Comments:

Send Reminders: YES (?)

External User	Name	Email	Permission (?)	Status
⊗ ☐		🗑 🔍	Select Option ▾	Not Started ▾

+ Add Row   ⊟ Remove Row

Screenshot	Directions

Step 18: 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.

Go to Step 19 to add internal collaborators, otherwise go to Step 20.

Screenshot	Directions

Screenshot

Name	Title	Status	Due Date	Notes
	🗑 🔍	Not Required	MM - DD - YYYY 📅	

Lookup - Collaborator Name[1]   ✖

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number ↑↓ ▼	Full Name ↑↓ ▼	Email Address ↑↓ ▼

Filter By : Full Name

[OK]   [CANCEL]

Lookup - Collaborator Name[1]   ✖

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number ↑↓ ▼	Full Name ↑↓ ▼	Email Address ↑↓ ▼
⊙	📄 USER1645611	Renee O'Rourke	renee.orourke@mass.gov

	External User	Name	Email	Permission ❓	Status
✖	☐	Renee O'Rourke 🗑 🔍	renee.orourke@mass.gov	Select Option ▼	Not Started ▼

✚ Add Row   ⊖ Remove Row

Directions

Step 19: Adding an Internal Collaborator

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

2. In the **Lookup – Collaborator Name** popup box, click on the down **triangle** in the **Full Name** column.

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.

CONTINUED ON NEXT PAGE.

Screenshot	Directions
Permission ⑦ Select Option ▼ **Select Option** Owner Edit Comment Read Only **Status** Not Started ▼ **Not Started** Shared Completed Not Completed	6. Click on the **down arrow** in the **Permission** column and select: • **Owner** - if the user selected will be an owner of the document. • **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.

Screenshot	Directions

Step 20: Starting the Collaboration Process

1. Click on the **EDIT** button. When you do, your name is added to the list of collaboratorsand the document displays.

Working Document Collaboration

Status: Not Started [EDIT] [SHARE] ?

Due Date: MM - DD - YYYY Comments:

Send Reminders: YES ?

External User	Name	Email	Permission ?	Status
✖ ☐			Select Option ▼	Not Started ▼

➕ Add Row ⊟ Remove Row

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

Tasks ✕

0 Tasks   [New Task]

Type task here. You can highlight a text area in the document to link to your task.

Assigned To:
Renee O'Rourke ▼

[Create Task]   Cancel

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.

Tasks ✕

1 Tasks   [New Task]

Status ▼   Assignee ▼

To:Renee O'Rourke / By:Paul Martin
/29/2022 11:28 AM
Assigned ▼
Task: Please edit.

💬 | Add Reply   ✏️ 🗑️

[COMPLETE REVIEW] [◂ SHARE DOCUMENT] [GO TO RECORD]

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

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

Working Document Collaboration

Status: Draft [EDIT] [SHARE] [✓ COMPLETE] [✖ CANCEL] ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ?

External User	Name	Email	Permission ?	Status
✖ ☐	Renee O'Rourke	renee.orourke@mass.gov	Edit ▼	Not Started ▼
✖ ☐	Paul Martin	paul.g.martin@mass.gov	Owner ▼	Not Started ▼

➕ Add Row ⊟ Remove Row

Screenshot	Directions

Working Document Collaboration Status: Shared [EDIT] [REPLACE WORKING DOCUMENT] [COMPLETE] [CANCEL] [NOTIFY SHARED COLLABORATORS] ? Due Date: 06 - 29 - 2022 📅 Comments: Send Reminders: YES ● 2 collaborators | 0 currently online 		External User	Name		Email	Permission ?		Status	
---	---	---	---	---	---	---	---	---
✖	☐	Renee O'Rourke	🗑 🔍	renee.orourke@mass.gov	Edit	▼	Shared	▼
✖	☐	Paul Martin	🗑 🔍	paul.g.martin@mass.gov	Owner	▼	Shared	▼ | ➕ Add Row ➖ Remove Row	8. When collaboration is completed, click on the **COMPLETE** button.

Completing Collaboration ✖ If the document contains redlines and/or comments, they will be retained in the working document if they are not resolved. [OK] [CANCEL]	**NOTE:** It is important to ensure that redlines and comments are resolved at this stage in the process prior to clicking on the OK button. 7. Click on the **OK** button in the **Completing Collaboration** popup box.

Working Document Collaboration Status: Completed [EDIT] [SHARE] ? Due Date: 06 - 29 - 2022 📅 Comments: Send Reminders: YES ● 		External User	Name		Email	Permission ?		Status	
---	---	---	---	---	---	---	---	---
✖	☐	Renee O'Rourke	🗑 🔍	renee.orourke@mass.gov	Edit	▼	Completed	▼
✖	☐	Paul Martin	🗑 🔍	paul.g.martin@mass.gov	Owner	▼	Completed	▼ | ➕ Add Row ➖ Remove Row	8. The status changes to **Completed.**

Step 21: Accessing the Package Documents Tab

1. Click on the **Package Documents** tab near the top of the page.

2. Click on the **NEW** button.

3. In the Document Type field, click on the **down arrow** next to **Select Option**, and select the desired document.

4. Add notes if desired.

5. Click on the **down arrow** next to the **Include with Vendor Contract** field and select **Yes** from the dropdown menu for documents to be included with the vendor contract.

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

7. Click on the **Upload Document** hyperlink and select the attachment from its location on your computer.

8. Click on the **SAVE** button at the bottom of the page, edit as needed, then click on the **VERIFIED** button at the bottom of the page. Repeat this process for each attachment.

9. Click on the **BIDPKG** hyperlink at the top of the page to leave the Package Documents tab and return to the Bid Package.

Screenshot	Directions
	Step 22: Completing the Approvers Section 1. For sequential approvals, select S**eria**l from the dropdown menu in the **Approval Method** field. For Simultaneous approvals, select **Parallel.** 2. Click on the **magnifying glass** search icon in the **Submitted For Approval By** field. 3. When the Lookup-Approver Name popup box displays, select the **right arrow** in the **Select** column next to the desired approver. 4. Enter notes, if desired, in the **Notes** text box. 5. Click on the **Add Row** hyperlink if you wish to add additional approvers. **NOTE:** ACPO Approval, Agency Head Approval, and CCPO Approval fields are optional fields that can be used if part of your organizational approval process.

Screenshot	Directions

Step 23: Completing the Legal subsection

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

2. When the **Lookup – Legal Approver** popup screen displays, select the **right arrow** in the Select column next to the name of the legal approver.

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

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

Screenshot	Directions

NOTE: The status changes to **Pending Approval.** After approval is received from the sourcing manager, the status changes to **Pending Legal Approval**. After legal approval, the status changes to **Approved**.

5. After legal approval is received, return to the **BIDPKG** and click on the **SEND BID** button on the bottom of the page.

Bid Package (Approved)
> STRTGY1667145 > BIDPKG1667191

Bid Packages   Package Documents

Sourcing Strategy Details

Document Number: WTR001
Title: Commercial and Recreational Watercraft
Agency: Operational Services Division — 1080 ⚠ *Agency Code does not match the Bid Package.*
Business Unit: Operational Services Division — OSD01 ⚠ *Business Unit does not match the Bid Package.*

Bid Package Details

COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929
Predecessor Bid Package:
Title: WTR01 Commercial and Recreational Watercraft *
Description / Scope: Commercial and recreational watercraft products and services. *
Type: Request for Response *
Agency: Operational Services Division — 1080
Business Unit: OSD TRAINING — OSD07
Contract Type: Blanket Purchase Agreement *
Estimated Amount: 1,000,000.00
SWC #: WTR01
Notice Type: ● Goods & Services ○ Construction ○ HHS/POS *

Goods and Services Details
Purchase Type: Term
Term Type: ● Dates ○ Duration *

[💾 SAVE] [SEND BID] [WITHDRAW] [✉] [⬇] [↺]

6. Click on the **Continue** button in the **Warning** popup screen.

Warning ✖

This action will send the document from this record to the associated record in your eProcurement system.

Do you wish to continue?

[CONTINUE] [CANCEL]

7. After the request is processed, click on the **OK** button in the **Sending Document** popup screen.

Sending Document ✖

The document has been sent successfully.

[OK]

8. **NOTE:** The status changes to **Ready to Post.** No further action is required in CLM.

Now return to the bid in COMMBUYS.

Bid Package (Ready to Post)
> STRTGY1667145 > BIDPKG1667191

Screenshot	Directions

Screenshot

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address   Bill-to Address

OSD07 - OSD TRAINING 🔍   OSD07 - OSD TRAINING 🔍

OSD Training   OSD Training
1 Ashburton Place   1 Ashburton Place
Suite 1017   Suite 1017
Boston, MA 02108   Boston, MA 02108
US   US
Email: test@periscopeholdings.com   Email: test@periscopeholdings.com
Phone: (123)456-7890   Phone: (123)456-7890

[Save & Continue] [Apply Ship-to to All Items] [Apply Bill-to to All Items]

Lookup Ship-to Address - Open Market Bid BD-22-1080-OSD03-OSD03-76004

Search Using: ALL of the criteria ⌄

Search Fields:
Department ID _____   Department Name _____
Department Suffix ID _____   Department Suffix Name _____
Location ID _____   Location Name _____
City _____   County _____

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

[Find It] [Clear]

[Close Window]

●	OSD09	OSD OVM	OVMW	OSD OVM/Westborough	OSD OVM / Tim Morrissey OSD OVM / Westborough Office 288 Lyman Street Westborough, MA 01581 US Email: test@periscopeholdings.com Phone: (123)456-7890
○	OSD10	OSD HRA	HRAAP	OSD HRA AP	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890

1-25 of 40
1 2

[Select] [Close Window]

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Confirmation Messages
Changes saved successfully.

Ship-to Address   Bill-to Address

OVMW - OSD OVM/Westborough 🔍   OSD07 - OSD TRAINING 🔍

OSD OVM / Tim Morrissey   OSD Training
OSD OVM / Westborough Office   1 Ashburton Place
288 Lyman Street   Suite 1017
Westborough, MA 01581   Boston, MA 02108
US   US
Email: test@periscopeholdings.com   Email: test@periscopeholdings.com
Phone: (123)456-7890   Phone: (123)456-7890

[Save & Continue] [Apply Ship-to to All Items] [Apply Bill-to to All Items]

Directions

Step 24: Completing the COMMBUYS Address Tab

NOTE: The General and Items tab information carries over from the Notice of Intent phase (if activated). Changes may be made if needed. If the default Ship-to or Bill-to address do not need to be changed, go on to **Step 25.**

If changes need to be made to the default Ship-to or Bill-to address:

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

2. Click on the **Find It** button on the **Lookup Ship-to Address** popup screen.

3. Select the **radio button** in the **Select** column next to the desired address.

4. Click on the **Select** button at the Bottom of the page.

5. Click on the **Save & Continue** button.

NOTE: The Accounting tab is not used. The Routing tab displays your approval path when submitting documents. The Attachments tab will contain any documents previously sent over from CLM (i.e. Letter of Intent; RFR).

Screenshot	Directions

Step 25: Completing the Notes Tab

1. If desired, enter notes in the box in the **Note** column next to your Username.

2. When finished, click on **the Save & Continue** button.

NOTE: These notes can be seen by you and others assigned to your work group by your COMMBUYS Organization Administrator. Vendors cannot see these notes. However, please be aware that anything entered in the COMMBUYS system is subject to Freedom of Information Act (FOIA) requests from vendors, the media, and the public at large.

NOTE: The Bidders tab carries over from the Notice of Intent/RFR phase.

Step 26: Completing the Questions Tab

1. Select the **Required** checkbox if you would like to ask a question that vendors will be required to answer.

2. Enter your question in the **Question** box.

3. You can determine the length and type of vendor response by clicking on the down arrow next to the **Availability Response** field and choosing one of the menu options.

4. Click on the **Save & Continue** button when finished.

NOTE: At this point, skip over the **Amendments** tab and return to it in **Step 29.**

Screenshot	Directions
	Step 27: Completing the Q&A Tab
Open Market Bid BD-22-1080-OSD03-OSD03-76004 Status: 2BI - In Progress General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q&A** Reminders Summary Question # Created Date User Created Question Subject Question Answer Show All on Web Show Original Vendor Only Delete All Add New: ☑ Allow vendor to submit questions ☑ Send notification when vendor submitting question Close Q&A For Vendor Date 📅 Save & Continue Reset	1. Select the **Allow vendor to submit questions** checkbox. 2. Select the **Send notification when vendor submitting question** checkbox. 3. If desired, the question period allotted to vendors can be set using the **calendar icon** in the **Close Q&A For Vendor Date** field. 4. Click on the **Save & Continue** button.
	Step 28: Completing the Reminders Tab
Open Market Bid BD-22-1080-OSD03-OSD03-76004 General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q&A **Reminders** Summary Due Date* (MM/DD/YYYY) Comment* (max 250 characters) Remind Whom* Days Prior to Remind* Date Completed (MM/DD/YYYY) Send Email 📅 ⌄ 0 ☐ Save & Continue Reset	1. If you wish to set up an autogenerated email reminder from COMMBUYS CLM, click on the **calendar icon** next to **the Due Date** field and select the date the reminder should be sent. 2. Enter the text of the reminder in the **Comment** field. 3. Click on the **down arrow** next to the **Remind Whom** field to select the recipient of the reminder email, either you or someone else in your workgroup. 4. If you would like a pre-reminder, indicate the number of days in the **Days Prior to Remind** field. 5. Click on the **Send Email** checkbox. 6. Click on the **Save & Continue** button.

Step 29: Completing the Amendments Tab

NOTE: If you have issued a Notice of Intent and replaced it with an RFR, complete this step. Otherwise go to **Step 30.**

1. Click on the **View Bid Amendment** button.

2. Click on the **General** tab of the amendment, then click on the down arrow in the **Procurement Type** column and select **Request for Response** from the dropdown menu.

3. Enter the **Estimated Award Date** using the MM/DD/YYYY format or by clicking on the calendar icon.

4. Click on the **Save & Continue** button at the bottom of the General tab page.

5. Click on the **Attachments** tab of the amendment and click on the **Add File** button to attach a document previously attached and verified in the CLM BIDPKG, then click on the **Save & Continue** button. **NOTE:** Repeat this step to attach all verified documents previously attached in the CLM BIDPKG.

6. When finished with the attachments, click on the **Summary** tab of the amendment.

Screenshot	Directions
Bid Amendment - Open Market Bid BD-22-1080-OSD07-OSD07-75929	7. Click on the **Apply Bid Amendment** button.

Step 30: Completing the Summary Tab

1. Click on the **Summary** tab then click on the **Submit for Approval** button at the bottom of the page. Once approved, the status changes from **In Progress** to **Ready to Send.**

2. Following approval, return to the **Summary** tab page, scroll to the bottom of the page and click on the **Send Bid** button.

3. When the screen re-displays with a list of vendors, click on the **OK** button at the bottom. This changes the status to **Sent.**

NOTE: The RFR has now been sent to the vendors.