Job Aid:
## How to Maintain Departments and Locations

This Job Aid shows how to:

• Create and maintain departments and locations in COMMBUYS.

Of Special Note:

Departments and locations are entered into the system by the Organization Administrator (OA) after discussion with the Agency Chief Procurement Officer and Chief Fiscal Officer. Thought and structure must be developed or known to ensure that the organization structure is established properly. OAs maintain the departments, locations, users, and approval paths for their organization in COMMBUYS. The set-up options available for OAs in COMMBUYS provide systematic control of the end-to-end procurement process including document creation rights, viewing privileges, and user workflow within their organization. **NOTE:** A department and a location must be assigned prior to adding agency users. If your organization does not have a department and a location, you can duplicate your organization (and/or department) information to satisfy that requirement.
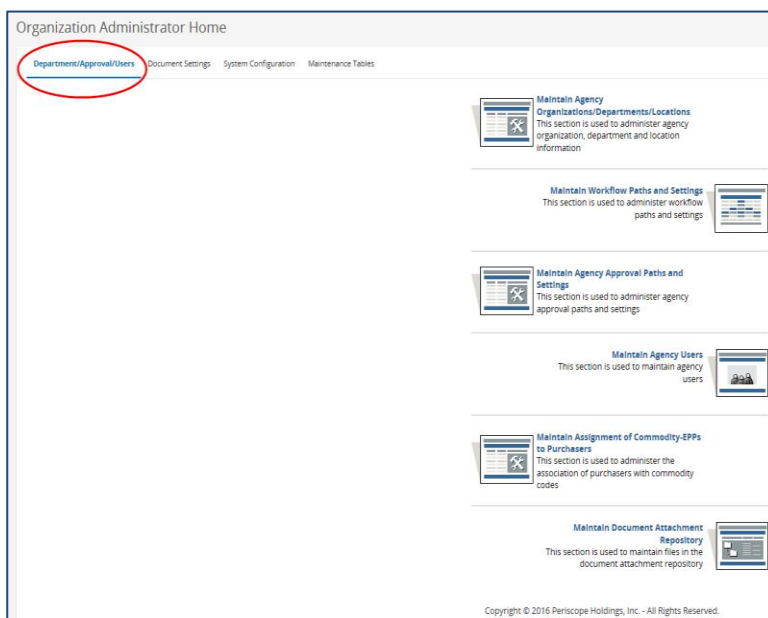
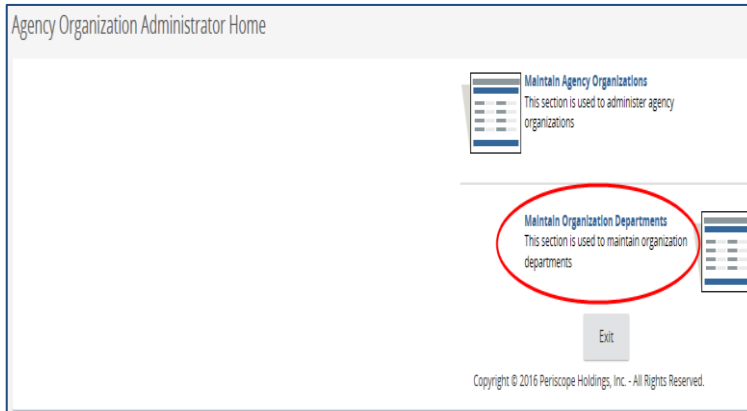| Screenshot	Directions
	Step 1: Opening the Department/Approval/Users Tab This is the Organization Administrator home page which has a **Control Center** for all actions related to department configuration and maintenance. The home page opens to the **Department/ Approval/Users** tab. This page is the main menu and the starting point for any department, approval, and user maintenance actions.
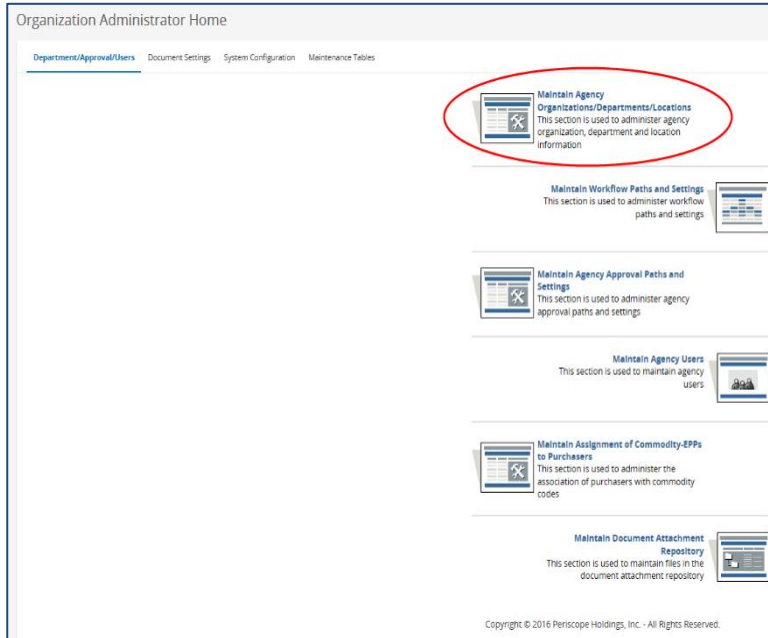
Screenshot	Directions
	Step 2: Opening the Maintain Agency Organizations/ Departments/ Locations Page To add or edit a new department, click on the **Maintain Agency Organizations/ Departments/ Locations** icon. COMMBUYS will open the Maintain Organization & Department view for the User's Current Organization.
	Step 3: Opening the Maintain Organization Page Click on the **Maintain Organization Departments** icon to add and maintain department information. This allows you to maintain **Departments**, which are the second tier of the organizational structure in COMMBUYS.

Screenshot	Directions

Step 4: Clicking on the Add Department Button

A list of all departments for your organization displays.

To add a department, click on the **Add Department** button at the bottom of the page.

If you want to modify an existing department, click on the blue Department ID hyperlink in the **Department ID** column.

Step 5: Adding a Department

To add a department for your organization, any field marked with an asterisk (*) must be completed.

Once complete, click on the **Save & Exit** button.

Field Descriptions:
1. **Department ID** – required; enter a unique identifier for the address; a 5-digit alpha-numeric ID. Once set, the department ID cannot be changed.
2. **Organization** – prefills with your current organization.
3. **Department Name** – required; enter a name for the department.
4. **Status** – select active or inactive only.
5. **Allow Manual Override. Encumbrance #** - Not applicable.
6. **Auto Encumbrance # Prefix** – Not applicable.
7. **Limit Solicitation Access** – If checked, solicitations associated with this department will be filtered out of external searches (e.g., Open Bids). (General rule - should not be used.)
8. **Limit Contract Access** – If checked, contracts associated with this department will be filtered out of external searches (e.g., Active Contracts). (General rule - should not be used.)

Screenshot	Directions

Step 6: Maintaining a Department

To maintain a department, return to the **Department Maintenance** page (also seen in Step 4) and select the department you wish to edit by clicking on the blue hyperlinked Department ID.

Department Maintenance for: Operational Services Division

Department ID ↕	Department Name
RRO22	RRO Test
RRO03	Test II - Renee
RRO01	Test - Renee
OSD14	OSD - LGE
OSD13	OSD CPS
OSD12	OSD EXE

Step 7: Editing Department Information

This page is broken up into three sections: Department Information, Department Address List, and Department Location List.

In the first section titled, **Department Information**, you are able to edit the department name and status.

Save any changes that are made.

Department Information

Department ID:	BIDS1	Organization	1990 - Department of State Purchasing
Department Name*	Procurement Department	Status	Active ∨

Allow Manual Override Encumbrance # ☐   Auto Encumbrance # Prefix

Alternate ID

Limit Solicitation access for external users (If checked, all Solicitations associated to this Department will be filtered out of external searches.) ☐

Limit Contract access for external users (If checked, all Contracts associated to this Department will be filtered out of external searches.) ☐

Save & Exit   Save & Continue   Reset

Step 8: Adding or Editing a Department Address

In the second section titled, **Department Address List**, all addresses within your department may be added or edited.

To add a department address, click on the **Add Dept Address** button.

NOTE: You can modify any existing address by clicking on the blue **Department Suffix ID** link next to the address you want to modify.

Department Address List

Department Suffix ID	Department Suffix Name	Address Info	Status
RRO01	Test - Renee	Renee O'Rourke, 1212 Main Street, 21st Floor, Boston, MA 02115, US, Email: noted@state.ma.us, Phone: (617)999-9999, FAX: (617)888-8888	Active
RRO02	Renee - Test	Renee Ranger, 1 Broadway, Boston, MA 02115, US, Email: noemail@state.ma.us, Phone: (617)222-2222	Active

Add Dept Address

Screenshot	Directions

Step 9: Adding a Department Address

To add a new department address to the department you selected, complete the required fields, and click on the **Save & Exit** button.

Field Descriptions:
- **Department Suffix ID** – required; unique identifier for the address; 5-digit alpha numeric ID, once set, the ID cannot be change.
- **Department Suffix Name** – required; description or name of address.
- **Status** – active or inactive.
- **Copy from Department Address** – if the address being added exists for another department, use the magnifying glass Icon to copy the address to the new department address. Changes can be made to the information populated.
- **Contact Name** – required; contact for the address.
- **Address Line** – required; Address Line 1 should be a valid street address if it's going to be used as a ship to address.
- Address Line 2, 3 & 4 can be other specific information about your address. Floor #, Bldg. Name, etc.
- **Country** – required; select from available Country Codes.
- **City** – required.
- **State/Province** – required; select from the drop-down menu.
- **Zip** – required.
- **County** – optional field.
- **Phone** – required; phone number including area code.
- **Ext** –for phone number if applicable.
- **Fax** – number can be entered if known.
- **Email** – required; email address for contact person.
- **Toll Free** – phone number including area code, if applicable.
- **Alt Reference** – alternate name for the address, if applicable.
- **Mobile** – cell phone number, if applicable.

Screenshot	Directions

Step 10: Adding a Location

In the third section, **Location List**, you are required to have at least one location for each department.

To add a location, click on the **Add Location** button.

Step 11: Adding Location Fields

Locations are the lowest level of the organization structure and are typically used for managing approval paths, default addresses, and purchaser assignments.

Add Location fields include:
- **Location ID** –5-digit alpha numeric ID; once set, it cannot be changed; 5-digit alpha numeric ID, once set ID cannot be changed.
- **Department** – select department from the drop-down menu.
- **Location Name** – required.
- **Status** – Active, Deleted, Inactive, Pending.
- **Location Type** – Leave Department Access as the default.
- **Purchaser** – optional if you want to have a default purchaser for this location. Select from the drop-down menu.
- **Ship-to Department Address** – choose a destination address.
- **Bill-to Department Address** – choose a bill-to address.

Once complete click on the **Save & Exit** button.

Screenshot	Directions
	NOTE: For details on the additional features below the address selection, it's recommended you seek direction from the Help Desk. • **Account Filter** – This feature is not enabled at this time. • **Email To** – optional; select a user from the drop-down menu for notification purposes. • **Allow PO Receipt Variance** – controls if PO Receipt Variances are allowed • PO Receipt Quantity Variance Percentage (0.0% means no limit) - % option to preset an amount of variance in the items received. • PO Receipt Dollar Variance ($0.00 means no limit) - same as above, using the dollar amount as the qualifier instead of quantity. • **Specify Purchaser Allowed** – allows the selection of a specific purchaser for the location, all documents created by this location will default to that purchaser. • **Limit Solicitation Access** – controls if solicitations associated with this location will be filtered out of external searches (e.g., Open Bids). • **Limit Contract Access** – controls if contracts associated with this location will be filtered out of external searches (e.g., Active Contracts).
	Step 12: Completing the Maintenance You are able to add as many departments, department addresses, and locations as desired (there is no quantity restriction). Once you are finished adding the department addresses and locations to your department; click **Exit** on the bottom of the screen to return to the Departments page.