



How to Maintain Departments and Locations

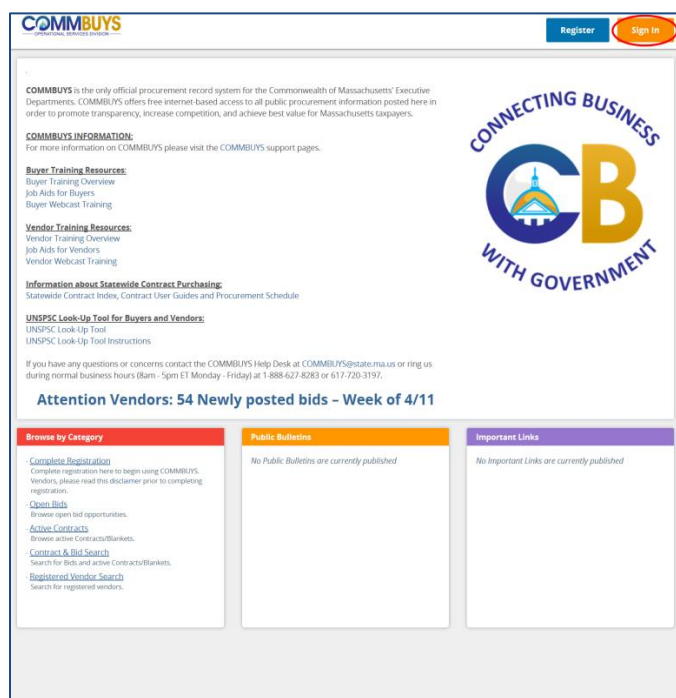
This Job Aid shows how to:

- 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.

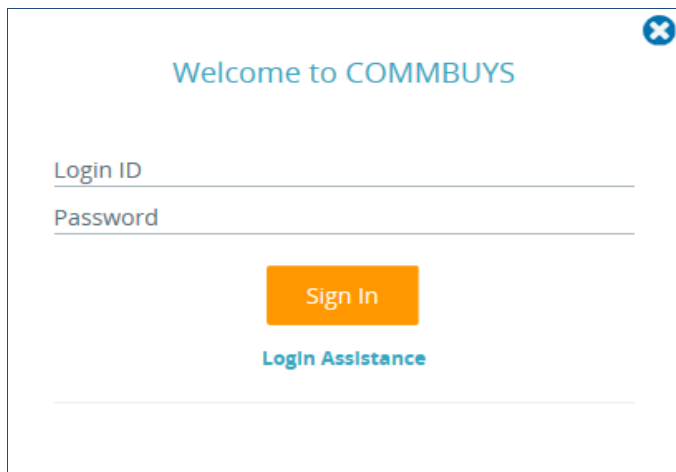
Screenshot



Directions

Step 1: Logging In

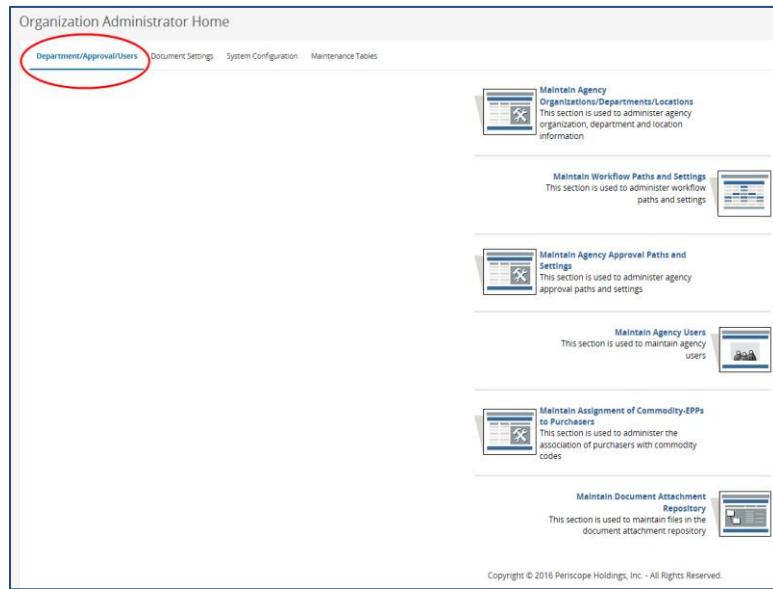
1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking the hyperlink [COMMBUYS](#).
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click on the **Sign In** button.





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Step 2: Opening the Department/Approval/Users Tab

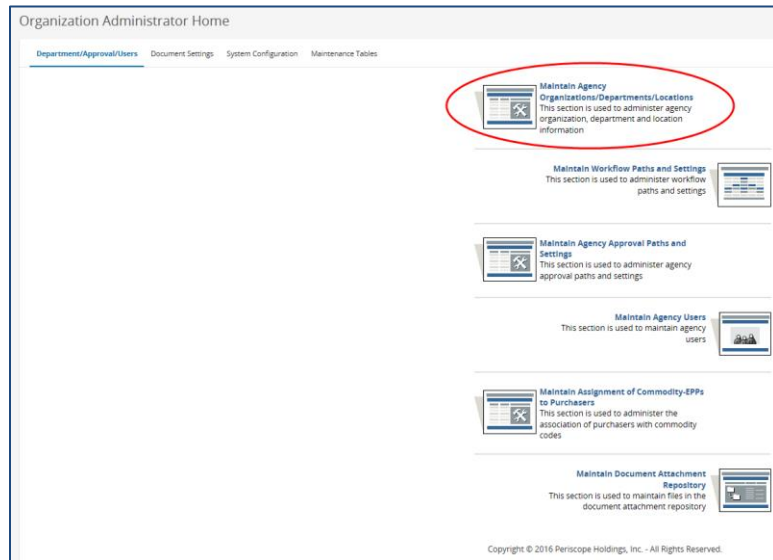
This is the Organization Administrator home page which has a **Control Center** for all actions related to department configuration and maintenance.

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.

Step 3: Opening the Maintain Agency Organizations/ Departments/ Locations Page

To add or edit a new department, click on the **Maintain Agency Organizations/ Departments/ Locations** icon.

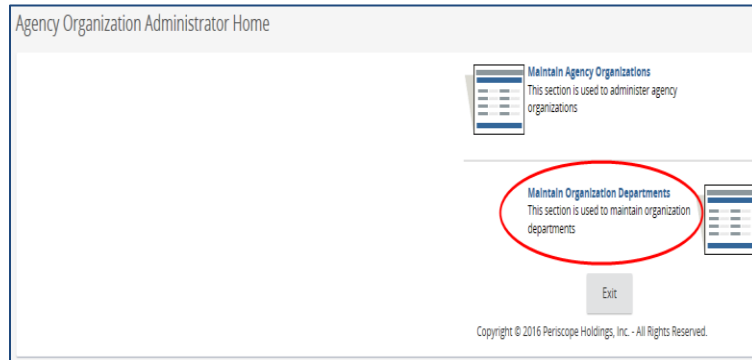
COMMBUYS will open the Maintain Organization & Department view for the User's Current Organization.





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Screenshot



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Step 4: 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.

Department Maintenance for: Operational Services Division

Department ID	Department Name	Organization	Status
0003	Human Resources	1000 - Operational Services Division	Active
1000000000	Default Data Conversion Department	1000 - Operational Services Division	Active
010001	Operational Services Division	1000 - Operational Services Division	Active
010002	OSD - Strategic Planning	1000 - Operational Services Division	Active
010004	OSD - JPC	1000 - Operational Services Division	Active
010005	OSD - JPC - ISO	1000 - Operational Services Division	Active
010006	OSD - COMMBUYS	1000 - Operational Services Division	Active
010007	OSD - Training	1000 - Operational Services Division	Active
010008	OSD - ISO	1000 - Operational Services Division	Active
010009	OSD - OAM	1000 - Operational Services Division	Active
010010	OSD - HRM	1000 - Operational Services Division	Active
010011	OSD - IAC	1000 - Operational Services Division	Active
010012	OSD - EAF	1000 - Operational Services Division	Active
010013	OSD - OPS	1000 - Operational Services Division	Active
010014	OSD - ISE	1000 - Operational Services Division	Active
010001	1000 - Reserve	1000 - Operational Services Division	Active
010022	0000 - Test	1000 - Operational Services Division	Inactive

[Add Department](#) Exit

Step 5: Clicking on the Add Department Button

A list of all departments for your organization displays.

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

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



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Screenshot

Add Department

Department Information

Department ID* Organization 1000 - Operational Services Division

Department Name* Status Active v

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)

Limit PO access for external users (If checked POs associated with this Department will be filtered out of external searches)

Save & Exit Save & Continue Reset Exit

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Directions

Step 6: Adding a Department

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

Once complete, click **Save & Exit**.

Field Descriptions:

- **Department ID** – required; enter a unique identifier for the address; a 5-digit alphanumeric ID. Once set, the department ID cannot be changed
- **Organization** – prefills with your current organization
- **Department Name** – required; enter a name for the department
- **Status** – select active or inactive only
- **Allow Manual Override Encumbrance #** - Not applicable
- **Auto Encumbrance # Prefix** – Not applicable
- **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.)
- **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.)
- **Limit PO Access** - If checked, POs associated with this department will be filtered out of external searches (General rule - should not be used.)

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: Maintaining a Department

To maintain a department, return to the Department Maintenance page (also seen in Step 5) and select the department you wish to edit by clicking the blue hyperlinked Department ID.



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Maintain Department for: Test - Renee

Department Information

Department ID: 0000 Organization: 1000 - Operational Services Division
 Department Name: Test - Renee Status: Active
 Allow Manual Override Encumbrance #: Auto Encumbrance Profile:

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):

Limit PO access for external users (if checked, POs associated with this Department will be filtered out of external searches):

Save & Exit Save & Continue Reset

Directions

Step 8: 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.

Department Address List

Department Suffix ID	Department Suffix Name	Address Info	Status
0001	Test - Renee	Renee O'Rourke 1212 Main Street 21st Floor Boston, MA 02115 US Email: reneor@osd.mva.us Phone: 617-999-9999 Fax: 617-999-9999	Active
0002	Renee - Test	Renee Ragner 1 Broadway Boston, MA 02115 US Email: renera@osd.mva.us Phone: 617-999-9999	Active

Add Dept Address

Step 9: 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 **Add Dept Address**.



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Step 10: Adding a Department Address

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

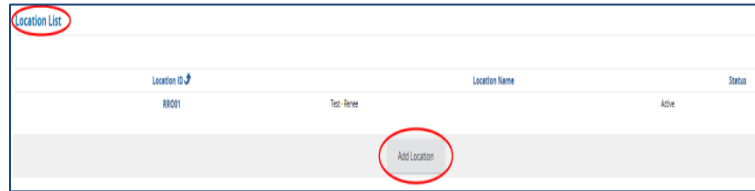
Field Descriptions:

- **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.
- **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 dropdown
- **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



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Step 11: 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 12: 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 list
- **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
- **Ship-to Department Address** – choose a destination address
- **Bill-to Department Address** – choose a bill-to address

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

Add Location

Location ID*: Department: RR001 - Test - Renee

Location Name*: Status: Active

Location Type: Department Access Purchaser:

Ship-to Department Address:

Bill-to Department Address:

Use the account filter to limit account selection for department access users.

Account Filter: Email-to:

Allow Requisition Allow Bid/Quote

Allow Open Market PO Allow Blanket PO Releases

Allow Contract PO Releases Allow PO Receipt Variance

PO Receipt Quantity Variance Percentage: (0.0% means no limit) %

PO Receipt Dollar Variance: (\$0.00 means no limit)

Auto Generate a Receipt via Credit Memo

Req Required Specify Purchaser Allowed

Add Ship-to Address Allowed Limit Solicitation access for external users (If checked, all Solicitations associated to this Location will be filtered out of external searches.)

Manual PO 2s Limit Contract access for external users (If checked, all Contracts associated to this Location will be filtered out of external searches.)

Disallow Receipt Entry Disallow Change Orders

Allocations Enforced

Enable Location Default Accounting

Allow agency role to view quantity on hand when adding inventory items to document:

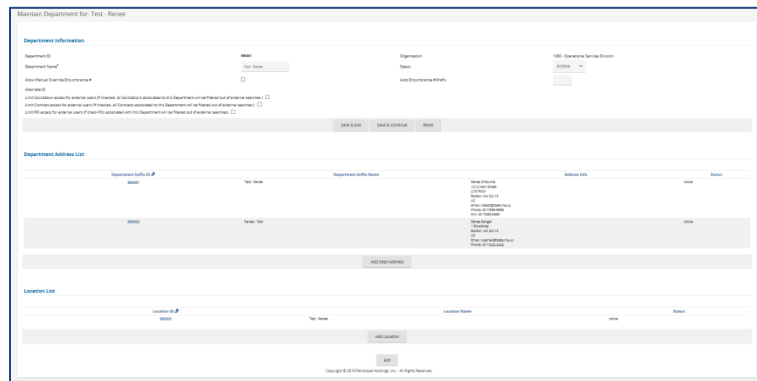
Department Access Basic Purchasing Inventory User

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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 list 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 13: 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.