

November 6, 2023

New Feature Announcement: Departmental RFR Template Available for COMMBUYS CLM

OSD has deployed a Departmental RFR Template in COMMBUYS CLM for use by Executive Agencies. The RFR Template is based on OSD's Full Departmental RFR template and it is pre-populated as the working document when a new Bid Package is created. OSD has set up some basic data injection points to insert data from the Bid Package form to the draft RFR, including Agency name, solicitation description, and procurement calendar dates. Using the document collaboration tool inside CLM, agency procurement staff may revise the template to include the details of the specific procurement. Procurement staff may include any team member in the document collaboration; CLM access is not required for collaborators. Use of the RFR template will help ensure that Departmental RFRs contain all required terms and current contract language.

Each Agency may assign a "Document Manager" (a role in CLM that may be assigned by Agency Organization Administrators) who will have permissions to customize CLM Templates. Agencies may use the OSD Departmental Template or, with the assistance of the OSD Help Desk, may upload their own RFR templates into CLM.

OSD's Training unit has developed a [webinar](#) and a [video](#) walkthrough to demonstrate how to edit, deploy, and maintain departmental templates for use in CLM, including how to insert data injection points into templates.

NOTE: Agencies are advised that an OSD Statewide Contract Template is visible to Document Managers in CLM. Users should be certain they are using the Departmental RFR template and not the SWC RFR Template.