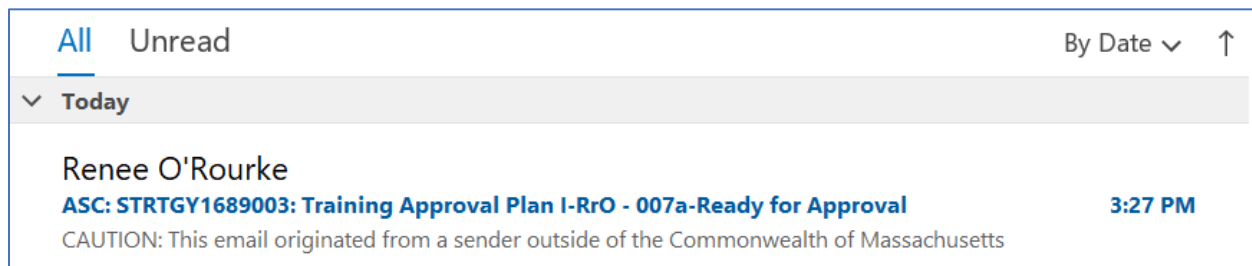# Approval Handout:
How to Approve documents in COMMBUYS CLM
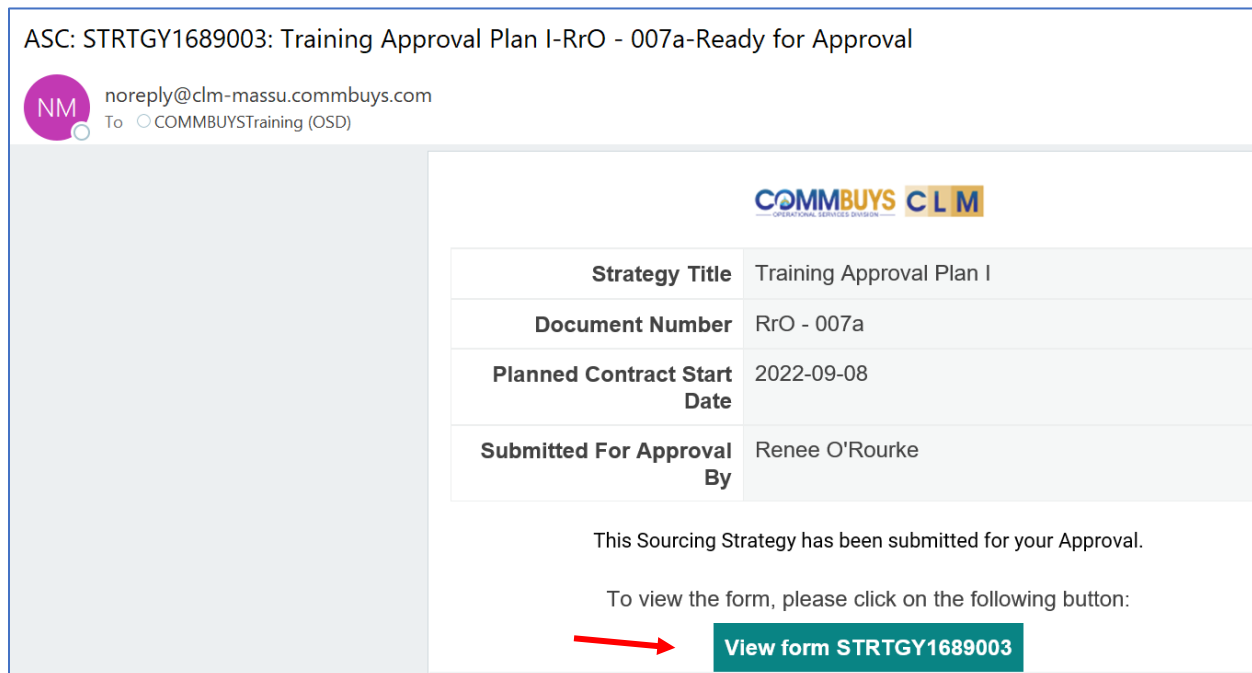
This Handout shows how to:

- Approve & Reject documents in COMMBUYS CLM
    - o Option 1 – You receive an email that you have something to approve.
    - o Option 2 – You are logged in and look at the list of items that require your approval.

Option 1

Email received that you have something to approve:

Body of Email. Click on the **View form** button. You will then be prompted to Log in

Log In.

You are brought to the document you need to approve. Form Status: Pending Approval.

For the Sourcing Strategy, it's a general overview. Look at the collaborators and who reviewed the documentation. Look at the documents and are the required ones there and are they correct? Is Finance aware of this? Do the dates align to the timetable?

For the Bid Package, it's a more thorough review. This level of approval would be similar to a Bid approval in COMMBUYS. Please be sure the Bid Package contents are in compliance with OSD Policies and any Departmental or procurement specific requirements. Review all of the content to be sure the request and requirements are clear for responding vendors.

Approval Section.

Shows who approved it prior to you if applicable. Also shows the Due Date of your approval. The Notes section is the note the creator wrote for you. You can add a note as the approver if you want.

If an approver after you rejects the document, you will then have to review again since it has been modified from your original review.

Action keys at the bottom of the page to **Approve** or **Reject**

If you Reject the approval, the status at the top shows Rejected and the status in the Approvers section shows Rejected. Although not required, its recommended to add a Note on why you rejected the document.

The creator of the document receives an email that you rejected the document.

The creator will then resubmit for approval once any issues have been corrected.

Option 2

As approver, if logged in, you can look to see if you have any documents to approve.

My List

There is one item to approve and it's in the section titled: *Approver – Pending Approvals – Sourcing Strategy*. Other documents will be found in the *Approver – Pending Approvals – Bid Packages*
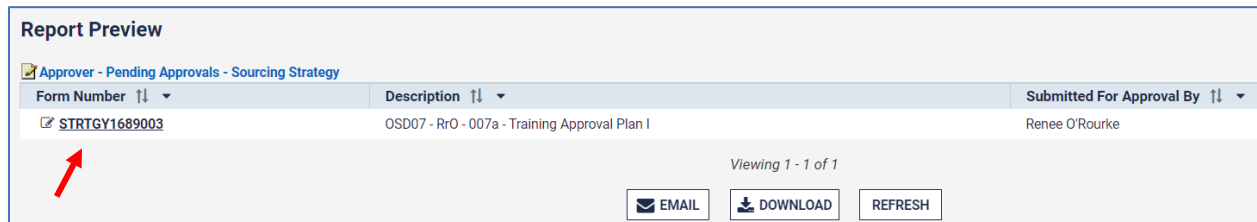
Click on the blue link: **Approver – Pending Approvals – Sourcing Strategy**

Report Preview. Shows the 1 item that needs approval.

Click on the **Strategy Form Number**

Sourcing Strategy is displayed and shows – Pending Approval

Approvers section of the Sourcing Strategy.

Status shows Pending. Note shown is from the creator, but the Approver can add a note.

To Approve, click on the **Approve** button at the bottom of the page.

Once Approved, the status at the top shows Approved. It will then move on to the next approver if applicable.