



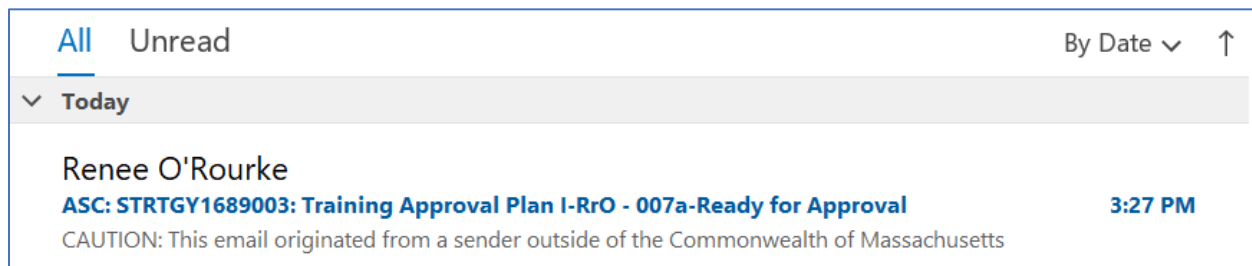
Approval Handout: How to Approve documents in COMMBUYS CLM

This Handout shows how to:

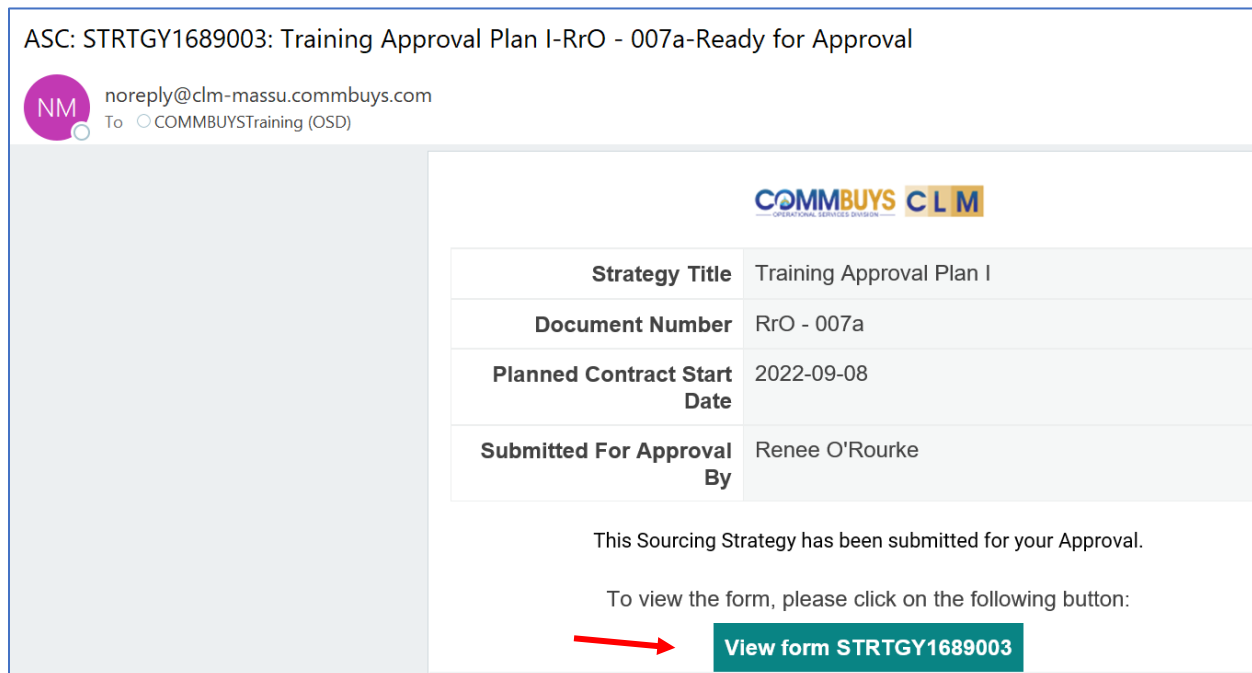
- Approve & Reject documents in COMMBUYS CLM
 - Option 1 – You receive an email that you have something to approve.
 - Option 2 – You are logged in and look at the list of items that require your approval.

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.


OPERATIONAL SERVICES DIVISION

Welcome

Log in to continue to Massachusetts ASC
Integration and CLM.

Email address

renee.orourke@mass.gov

Password

.....

👁

[Forgot password?](#)

Continue

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.

Sourcing Strategy (Pending Approval)

< ✓ 2 3 >

Draft Approval Complete

Sourcing Strategy

Bid Packages

Hierarchy

Sourcing Strategy Details

Type: New

Document Number: RrO - 007a

Title: Training Approval Plan I

Description: This is for the creation of my training documentation for approvals.

Requestor: Renee O'Rourke

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.

Approvers

Approval Method: Serial

Submitted For Approval By: Renee O'Rourke

Name	Title	Status	Due Date	Notes
COMMBUYS Training	Approver	Pending	09 - 08 - 2022	Please approve.

ACPO Approval: Not Required ▼

Agency Head Approval: Not Required ▼

OSD Legal Approval: Not Required ▼

CCPO Approval: Not Required ▼

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

SAVE

APPROVE

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.

Sourcing Strategy (Rejected)
> STRTGY1689003

<

1
Draft

2
Approval

3
Complete

>

Approvers

Approval Method: Serial
Submitted For Approval By: Renee O'Rourke

Name	Title	Status	Due Date	Notes
COMMBUYS Training	Approver	Rejected	09 - 14 - 2022	Rejecting due to missing data. Please fix and resubmit for approval.

+ Add Row
Remove Row

ACPO Approval: Not Required
Agency Head Approval: Not Required
OSD Legal Approval: Not Required
CCPO Approval: Not Required

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*

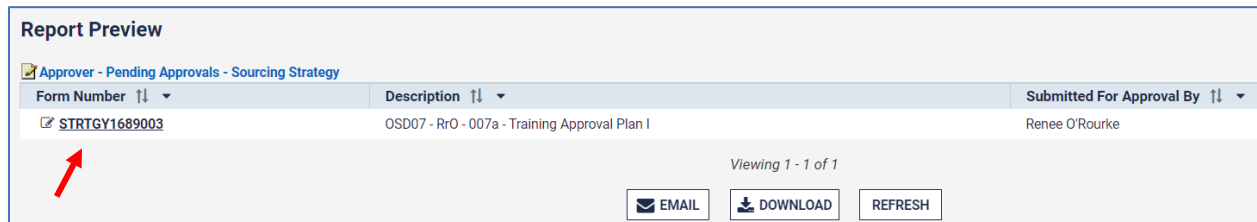
Click on the blue link: **Approver – Pending Approvals – Sourcing Strategy**



Name	Result Count	Created By	Form Type
Agency Head Approver - My Plans and RFRs for Approval TEST	0	Shyam Kolavelli	MASS.All RFX Forms
Approver - Pending Approvals - Sourcing Strategy	1	Shyam Kolavelli	MASS.Sourcing Strategy
Approver - Approved Plans	175	Shyam Kolavelli	MASS.Sourcing Strategy
Approver - My Approved Plans	43	Shyam Kolavelli	MASS.Sourcing Strategy
Approver - My Approved Solicitations	10	Shyam Kolavelli	MASS.Bid Package
Approver - Pending Approvals - Bid Packages	0	Michael Phillips	MASS.Bid Package
Approver - Solicitations Pending My Approval	0	Shyam Kolavelli	MASS.Bid Package
Contracts - End Date within 30 Days	11	Aditya Sai	MASS.Contract
Contracts - End Date within 90 Days	13	Aditya Sai	MASS.Contract
Esign	6	Shyam Kolavelli	MASS.Contract
MASS - Contract - My Collaborations	0	Aditya Sai	MASS.Contract
MASS - Contract - Owner Collaborations	0	Aditya Sai	MASS.Contract
MASS - Legal Approvers - Bid Package Pending Approvals	0	Michael Phillips	MASS.Bid Package
MASS - Legal Approvers - Vendor Contract Pending Approvals	0	Michael Phillips	MASS.Contract

Report Preview. Shows the 1 item that needs approval.

Click on the **Strategy Form Number**



Form Number	Description	Submitted For Approval By
STRTGY1689003	OSD07 - RrO - 007a - Training Approval Plan I	Renee O'Rourke

Viewing 1 - 1 of 1

[EMAIL](#) [DOWNLOAD](#) [REFRESH](#)

Sourcing Strategy is displayed and shows – Pending Approval

Sourcing Strategy (Pending Approval)

> STRTGY1689003

Draft Approval Complete

Sourcing Strategy Bid Packages Hierarchy

Sourcing Strategy Details

Type: New

Document Number: RrO - 007a

Title: Training Approval Plan I

Description: This is for the creation of my training documentation for approvals.

Requestor: Renee O'Rourke

Approvers section of the Sourcing Strategy.

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

Approvers

Approval Method: Serial

Submitted For Approval By: Renee O'Rourke

Name	Title	Status	Due Date	Notes
COMMBUYS Training	Approver	Pending	09 - 08 - 2022	Please approve.

ACPO Approval: Not Required

Agency Head Approval: Not Required

OSD Legal Approval: Not Required

CCPO Approval: Not Required

SAVE APPROVE REJECT

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

SAVE APPROVE REJECT

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

Sourcing Strategy (Approved)

> STRTGY1689003

Draft Approval Complete

Sourcing Strategy Bid Packages Hierarchy