



Legal Approval Handout: How to Legal 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:

Today


Renee O'Rourke

ASC: BIDPKG1689340: Legal Aid Creation-RrO - 007a-Submitted for your Approval 2:39 PM


CAUTION: This email originated from a sender outside of the Commonwealth of Massachusetts mail

Body of Email. Click on the **View form** button.

ASC: BIDPKG1689340: Legal Aid Creation-RrO - 007a-Submitted for your Approval




noreply@clm-massu.commbuys.com
To ○ COMMBUYSTraining (OSD)



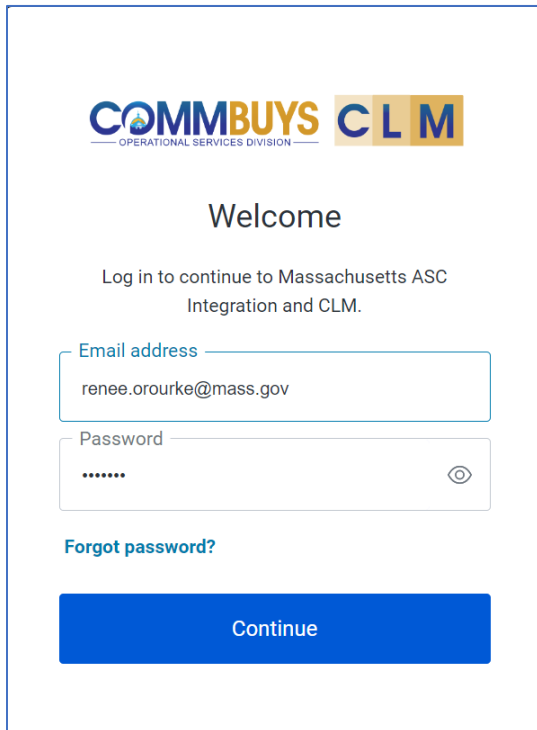
Bid Package Title	Legal Aid Creation
Bid Package Type	Request for Response
Document Number	RrO - 007a
Contract Type	Blanket Purchase Agreement

This Bid Package has been submitted for your Approval.

To view the form, please click on the following button:

[View form BIDPKG1689340](#)

You will be prompted to Log in



The login screen features the COMMBUYS CLM logo at the top, with 'COMMBUYS' in blue and orange and 'CLM' in blue. Below the logo is the text 'Welcome'. A message states 'Log in to continue to Massachusetts ASC Integration and CLM.' There are two input fields: 'Email address' containing 'renee.orourke@mass.gov' and 'Password' with masked characters and an eye icon. A 'Forgot password?' link is below the password field. A blue 'Continue' button is at the bottom.

COMMBUYS CLM
OPERATIONAL SERVICES DIVISION

Welcome

Log in to continue to Massachusetts ASC
Integration and CLM.

Email address
renee.orourke@mass.gov

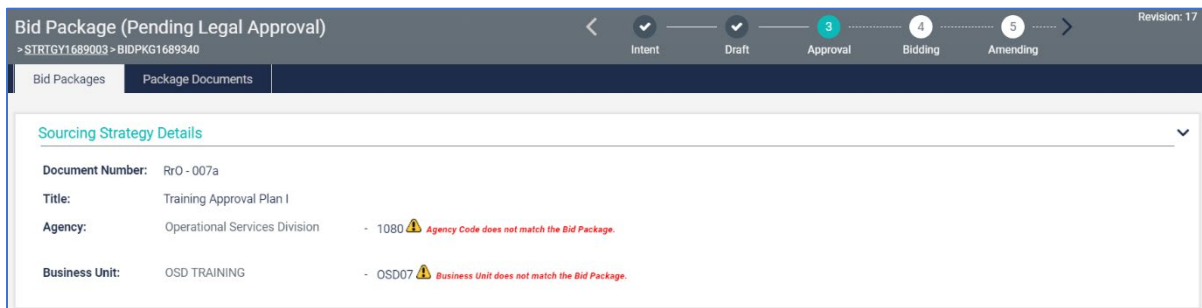
Password
.....

[Forgot password?](#)

Continue

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

Verify all the required documents are included, that all required information is included and that all the documents have the correct language.



The screen shows a 'Bid Package (Pending Legal Approval)' header with a breadcrumb trail '> STR1GY1689003 > BIDPKG1689340'. A progress bar at the top indicates the current stage is 'Approval' (3), with previous stages 'Intent' (1) and 'Draft' (2) completed, and future stages 'Bidding' (4) and 'Amending' (5) pending. Below the progress bar are tabs for 'Bid Packages' and 'Package Documents'. The 'Sourcing Strategy Details' section is expanded, showing document information and error messages.

Bid Package (Pending Legal Approval)
> STR1GY1689003 > BIDPKG1689340

Intent Draft Approval Bidding Amending

Revision: 17

Bid Packages Package Documents

Sourcing Strategy Details

Document Number: RrO - 007a

Title: Training Approval Plan I

Agency: Operational Services Division - 1080 ⚠ Agency Code does not match the Bid Package.

Business Unit: OSD TRAINING - OSD07 ⚠ Business Unit does not match the Bid Package.

Approval Section. Shows who approved it prior to legal. In the Legal section, it shows the Due Date of your approval. The Notes section in the Legal section allows the approver to add a note.

Approvers

Approval Method: Serial

Submitted For Approval By: Renee O'Rourke

Name	Title	Status	Due Date	Notes
Tim Kennedy	Strategic Sourcing Senior Manager	Approved	09 - 14 - 2022	Please Approve

Legal Approval: Required

ACPO Approval: Not Required

Agency Head Approval: Not Required

CCPO Approval: Not Required

Legal

Name: COMMBUYS Training

Due Date: 09 - 15 - 2022

Notes:

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

SAVE

APPROVE

REJECT

If you Reject the approval, you will need to add a comment in the Notes field. If you don't, you will receive an Error message. Click OK, add a Note and then click on Reject to complete the process.

Error

Approver Notes must be entered when rejecting.

OK

CANCEL

Once Rejected, the status at the top shows Rejected, In the Approvers section, it changes back to Required next to the original approvers. Since it has been rejected, it needs to go through the entire approval process.

Bid Package (Rejected)

> STR1GY1689003 > BIDPKG1689340

<

✓

2

3

4

5

>

Intent

Draft

Approval

Bidding

Amending

Approvers

Approval Method: Serial

Submitted For Approval By: Renee O'Rourke

Name	Title	Status	Due Date	Notes
Tim Kennedy	Strategic Sourcing Senior Manager	Required	09 - 14 - 2022	Please Approve

Legal Approval: Required

ACPO Approval: Not Required

Agency Head Approval: Not Required

CCPO Approval: Not Required

Legal

Name: COMMBUYS Training

Due Date: 09 - 15 - 2022

Notes:

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 an approver, if you're logged in, you can look to see if you have anything to approve.

My List














There is one item to approve and it's in the line titled: *MASS - Legal Approvers - Bid Package Pending Approvals*.

Click on the blue link: **MASS - Legal Approvers - Bid Package Pending Approvals**

My List			
Name 	Result Count	Created By 	Form Type
 Agency Head Approver - My Plans and RFRs for Approval TEST	0	Shyam Kolaveli	MASS.All RFX Forms
 Approver - Pending Approvals - Sourcing Strategy	0	Shyam Kolaveli	MASS.Sourcing Strategy
 Approver - Approved Plans	181	Shyam Kolaveli	MASS.Sourcing Strategy
 Approver - My Approved Plans	44	Shyam Kolaveli	MASS.Sourcing Strategy
 Approver - My Approved Solicitations	10	Shyam Kolaveli	MASS.Bid Package
 Approver - Pending Approvals - Bid Packages	0	Michael Phillips	MASS.Bid Package
 Approver - Solicitations Pending My Approval	0	Shyam Kolaveli	MASS.Bid Package
 Contracts - End Date within 30 Days	12	Aditya Sai	MASS.Contract
 Contracts - End Date within 90 Days	14	Aditya Sai	MASS.Contract
 Esign	6	Shyam Kolaveli	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	1	Michael Phillips	MASS.Bid Package

Report Preview. Shows the 1 item that needs approval.

Click on the **Bid Package Form Number**

Report Preview							
 MASS - Legal Approvers - Bid Package Pending Approvals							
Form Number 	Bid Package Title 	Document Number 	Created by 	Sourcing Manager 	Statewide Contract 	Status 	Submitted For Approval By 
 BIDPKG1689340	Legal Aid Creation	RrO - 007a	Renee O'Rourke	Renee O'Rourke		Pending Legal Approval	Renee O'Rourke
Viewing 1 - 1 of 1							
 EMAIL  DOWNLOAD  REFRESH							

Bid Package is displayed and shows – Pending Legal Approval

Bid Package (Pending Legal Approval)

> STR1GY1689003 > BIDPKG1689340

Intent Draft Approval Bidding Amending

Bid Packages Package Documents

Sourcing Strategy Details

Document Number: RrO - 007a

Title: Training Approval Plan I

Agency: Operational Services Division - 1080 ⚠ Agency Code does not match the Bid Package.

Business Unit: OSD TRAINING - OSD07 ⚠ Business Unit does not match the Bid Package.

Approvers section of the Bid Package. You will see who approved it previously and any comments (by creator or approver) in the Notes section. You can add a comment in the Notes field in the Legal section.

Approvers

Approval Method: Serial

Submitted For Approval By: Renee O'Rourke

Name	Title	Status	Due Date	Notes
Tim Kennedy	Strategic Sourcing Senior Manager	Approved	09 - 14 - 2022	Please Approve

Legal Approval: Required

ACPO Approval: Not Required

Agency Head Approval: Not Required

CCPO Approval: Not Required

Legal

Name: COMMBUYS Training

Due Date: 09 - 15 - 2022

Notes:

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

SAVE APPROVE REJECT

Once Approved, the status at the top shows Approved. .

Bid Package (Approved)

> STR1GY1689003 > BIDPKG1689340

Intent Draft Approval Bidding Amending

Bid Packages Package Documents