

CLM Organization Administrator Handout: COMMBUYS CLM

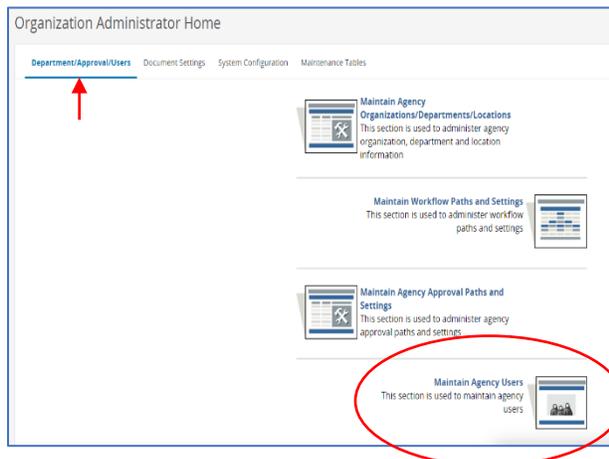
This Handout shows how to:

- Edit User Roles to give CLM Permissions
- Enable Single Sign On (SSO) for users

Agency Users

As the Organization Administrator, you can give CLM access to existing users.

From the Organization Administrator home page (you are automatically brought to the Departments/Users/Approvers tab), click on the **Maintain Agency Users** icon.



User Maintenance page.

Top of the page allows you to search for users. You can search by specific information such as the Name, Email, Log In ID, etc. Or you can search by a group of users such as the Department they work in, Role, etc. After filling in information in the field(s), click on the Find It button to display users.

The bottom of the page will list all users in your Organization. If you use one of the search features at the top, it will only display the applicable ones that fit that criteria.

Top of the User Maintenance page.

User Maintenance for: Department of State Purchasing

Search Using: ALL of the criteria

Search Fields:

- First Name
- Last Name
- Login ID
- Status
- Email
- Department
- Location
- SSO ID
- User Role
 - Vendor Administrator
 - Basic Purchasing
 - Internal Administrator
 - Agency Administrator
 - Program Administrator
 - Organization Administrator
 - Department Access
 - Inquiry
 - Accounts Payable
 - Form Builder Administrator

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It Clear Add User

Bottom of the User Maintenance page. The users will be listed alphabetically by the Login ID column.

Login ID	First Name	Last Name	Email	Status	Role(s)	Organization
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To edit a specific user, click on the users Login ID which is a blue hyperlink

Login ID
ASawant
ASTOLER
Azapar
BBARNEKE
BBURKE
BBUXTON1
be_pdruciak
bechicago

You are now able to edit that specific user.

Each section of the Users Profile can be modified by clicking on the Edit button next to that specific section. We will be concentrating on the CLM Permission section at the bottom of the page.

Top of the User Maintenance Page

User Maintenance for: Bill O'Malley

User Profile Edit

Salutation
Phone
Job Title
Login ID
Mobile Phone

User Defaults Edit

Default Shipping Address

Default Account Code
Default Organization
Default Location

Purchasing Rules Edit

Open Market Req Limit
Direct Open Market Limit

Bottom of the User Maintenance Page. Click on the **Edit** button next to CLM Permissions.

Roles Edit

Basic Purchasing

Organization Privileges

Organizaton ID	Organization Name
1990	Department of State Purchasing

CLM Permissions Edit

Access Groups

There are two sections to complete. Access & Groups.

CLM Permissions for:

Access
 Select CLM Access ▾

Groups
 (At least one group must be selected for user to have access to CLM functions).

MASS-Solicitation Approvers	<input type="checkbox"/>
MASS-Contract Managers	<input type="checkbox"/>
MASS-Sourcing Managers	<input type="checkbox"/>
MASS-Legal Approvers	<input type="checkbox"/>
MASS-Education	<input type="checkbox"/>
MASS-Approver	<input type="checkbox"/>
MASS-Contract Approvers	<input type="checkbox"/>
MASS-CCPO	<input type="checkbox"/>
MASS-Users	<input type="checkbox"/>
MASS-All Partitions	<input type="checkbox"/>
MASS-AH	<input type="checkbox"/>
MASS-ACPO	<input type="checkbox"/>
MASS-Admin	<input type="checkbox"/>
MASS-Finance	<input type="checkbox"/>

Access & Role definitions:

Read	<p>A user with Read access will have access to all records in the system that have been provided to the group. All fields on all records are not editable and there is no Save button presented to a Read user.</p> <p>Read users may download documents and file attachments, but may not upload documents.</p> <p>Read users may search and report on all records to which they have access.</p>
Approver	<p>A user with Approver access may add notes to the record they are approving and attach updated, redlined documents, if applicable. They are presented with Approve and Reject buttons only.</p> <p>Approver users do not have the ability to search and report. Their only access to the system is via a list of records that require their attention.</p>
Write	<p>A user with Write access has full use of the system as defined by the permissions of their group. They may search to locate records to which they have access, they may report and they may approve, if they are assigned as an approver.</p>

Click on the **Select CLM Access** drop down to choose their role. In my example, I'm going to give the user the **Write** role which will allow them to create the documents in CLM and also approve if they are assigned as an approver.

Groups: Select at least one.

Role / Group	Description of Role
Sourcing Managers	<p>Sourcing Managers may create Sourcing Strategy and Bid Package records and manage them through to completion.</p> <p>MA Role: Sourcing Managers Minimum Access: Write Permission: Form creation for Sourcing Strategy, Master Blanket, Vendor, and Vendor Contract, Subcontract, and Amendment records. Bid Package documents are created from COMMBUYS. Master Blanket records are created by the system the first time a Bid Package is sent to COMMBUYS.</p>
Unit Solicitation Approvers	<p>Unit Solicitation Approvers typically have <u>write</u> permissions and have full access to the system. They may be provided approve permission, which limits their access to records when their approval is required. They are responsible for approving Sourcing Strategy and Bid Package records.</p> <p>MA Role: Sourcing Senior Managers and Director of Strategic Sourcing Minimum Access: Approve Permission: Approval workflow permissions and editing of fields, as required.</p>
Contract Managers	<p>Contract Managers may manage Master Blanket and Vendor Contract, Subcontract, and Amendment records.</p> <p>MA Role: Contract Managers Minimum Access: Write Permission: Form creation for Vendor and Vendor Contract records. These forms are created from actions in COMMBUYS.</p>
Unit Contract Approvers	<p>Unit Contract Approvers typically have <u>write</u> permissions and full access to the system. They may be provided approve permission, which limits their access to records when their approval is required. They are responsible for approving Vendor Contract records.</p> <p>MA Role: Sourcing Senior Managers and Director of Strategic Sourcing Minimum Access: Approve Permission: Approval workflow permissions and editing of fields, as required.</p>
Legal Approvers	<p>Legal Approvers may approve Bid Package and Vendor Contract records as optional approvers as required. They may adjust requirements for ACPO, Agency Head, and CCPO, as required.</p> <p>MA Role: Legal/General Counsel Minimum Access: Approve Permission: Approval workflow permissions.</p>
ACPO	<p>The Agency Chief Procurement Official may approve Sourcing Strategy, Bid Package, and Vendor Contract records as an optional approver, as required. They may adjust approval requirements for Agency Head and CCPO, as required.</p> <p>MA Role: Agency Chief Procurement Official Minimum Access: Approve Permission: Approval workflow permissions.</p>
Agency Head	<p>The Agency Head may approve Sourcing Strategy, Bid Package, and Vendor Contract records as an optional approver, as required. They may adjust approval requirements for CCPO, as required.</p> <p>MA Role: Agency Head Minimum Access: Approve Permission: Approval workflow permissions.</p>
Read User	<p>Read users may search and report within the system and do not have one of the roles above. They have access to all <u>records</u>, but are unable to edit records.</p> <p>Access: Read Only</p>

In our example, we are going to assign the user **Sourcing Manager & Contract Manager**.

After selecting the Access and Groups, click on the **Save & Continue** button.

Access

Write

Groups

(At least one group must be selected for user to have access to CLM functions).

MASS-Solicitation Approvers	<input type="checkbox"/>
MASS-Contract Managers	<input checked="" type="checkbox"/>
MASS-Sourcing Managers	<input checked="" type="checkbox"/>
MASS-Legal Approvers	<input type="checkbox"/>
MASS-Education	<input type="checkbox"/>
MASS-Approver	<input type="checkbox"/>
MASS-Contract Approvers	<input type="checkbox"/>
MASS-CCPO	<input type="checkbox"/>
MASS-Users	<input type="checkbox"/>
MASS-All Partitions	<input type="checkbox"/>
MASS-AH	<input type="checkbox"/>
MASS-ACPO	<input type="checkbox"/>
MASS-Admin	<input type="checkbox"/>
MASS-Finance	<input type="checkbox"/>

Save & Exit **Save & Continue** Cancel & Exit

Ensure your changes were saved.

CLM Permissions for:

System Warning(s)

Changes saved successfully.

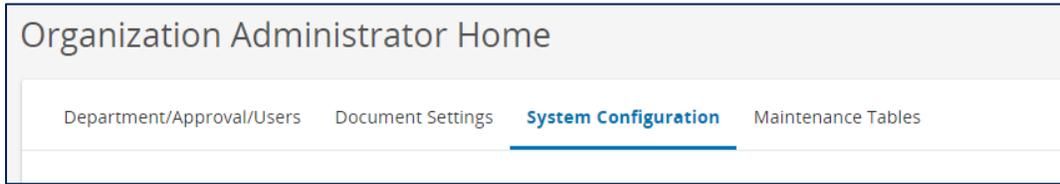
In the Users Profile, the CLM Permissions is visible.

CLM Permissions Edit

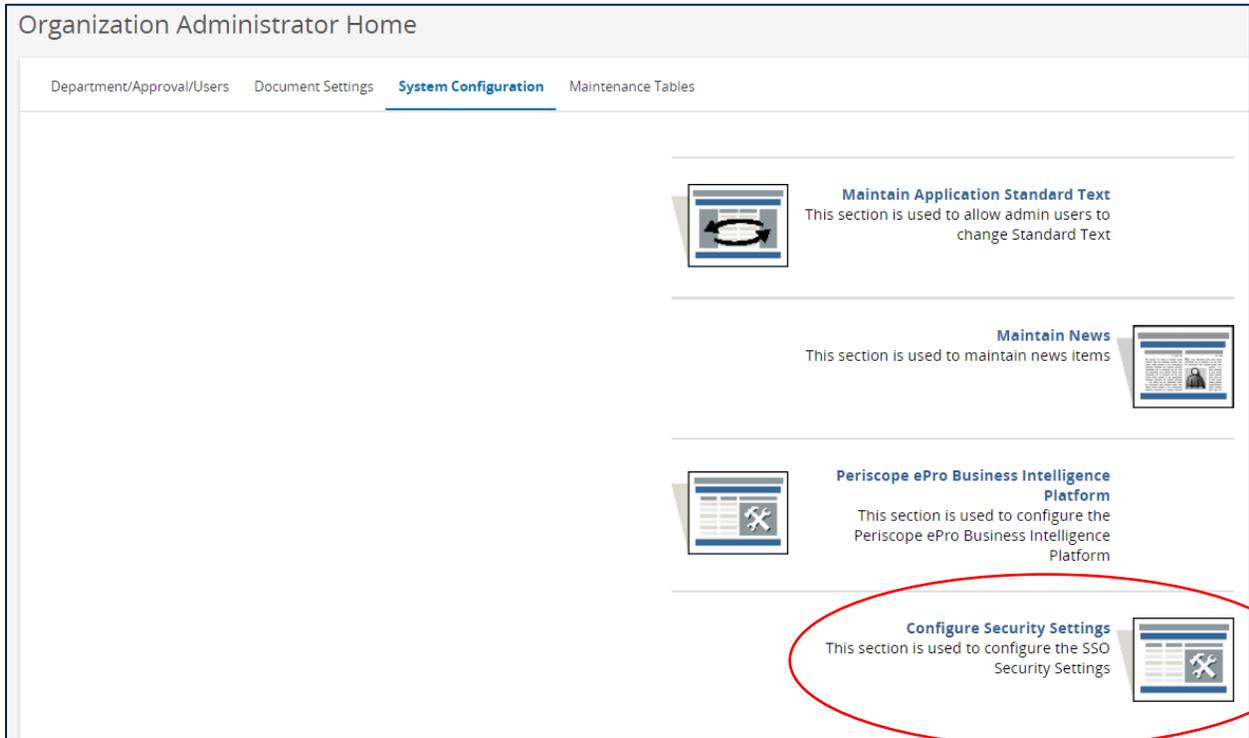
Access Write **Groups** MASS-Contract Managers , MASS-Sourcing Managers

Once you have given the CLM Permissions, you now need to go into the System Configuration to allow for Single Sign On.

From the Organization Administrator home page, click on the **System Configuration** tab.



Click on the **Configure Security Settings** icon.



Configure Organization Security Settings page.

Like before, the top of the page allows you to search for users. You can search by specific information such as the Name, Email, Log In ID, etc. Or you can search by a group of users such as the Department they work in, Role, etc. After filling in information in the field(s), click on the Find It button to display users.

The bottom of the page will list all users in your Organization. If you use one of the search features at the top, it will only display the applicable ones that fit those criteria.

Top of the Configure Organization Security Settings page.

Configure Organization Security Settings:

Enable Single Sign On:

Single Sign-On User Settings:

Search Using: ALL of the criteria ▼

Search Fields:

First Name Last Name

Login ID

Email

Department ▼

Location ▼

User Role

- Vendor Administrator
- Basic Purchasing
- Internal Administrator
- Agency Administrator
- Program Administrator
- Organization Administrator
- Department Access
- Inquiry
- Accounts Payable
- Form Builder Administrator

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It Clear

Bottom of the Configure Organization Security Settings page. In the Disable Single Sign On column, de-select the check box next to the user you are updating with the COMMBUYS CLM Permissions.

First Name	Last Name	Login ID	Email	Role(s)	Disable Single Sign-On
Bill	O'Malley4	PCURE04	commbuystraining04@mass.gov	Basic Purchasing	<input checked="" type="checkbox"/>

Once you remove the checkmark in the box, ensure you Save your changes by clicking on one of the buttons at the bottom of the page.

First Name	Last Name	Login ID	Email	Role(s)	Disable Single Sign-On
Bill	O'Malley4	PCURE04	commbuystraining04@mass.gov	Basic Purchasing	<input type="checkbox"/>

Save & Exit Save & Continue Reset Exit