

Job Aid: How to Approve Documents

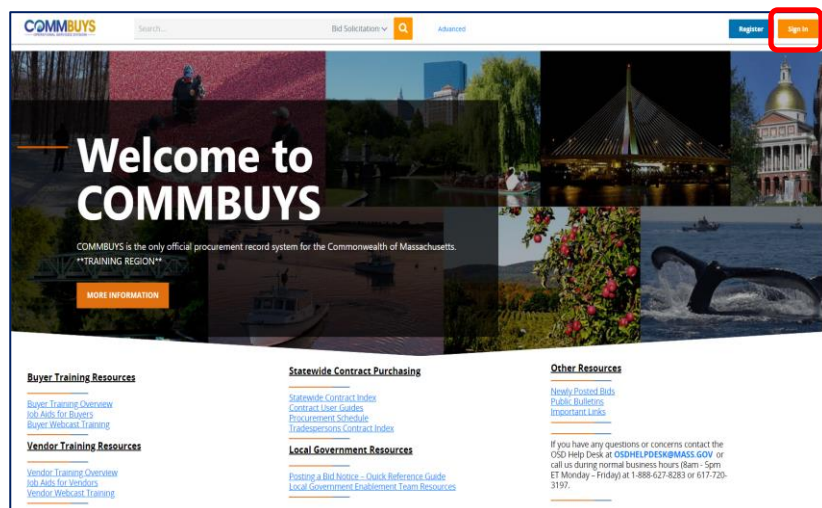
This Job Aid shows how to:

- Access “ready for approval” documents
- Add additional approvers to an approval path
- Approve, disapprove, and cancel documents routed for approval

Of Special Note:

When a document is submitted for approval, COMMBUYS determines which users must approve the document based on the approval path criteria established by Organization Administrators. COMMBUYS then notifies each approver via email once it is their turn to approve a document. Documents requiring approval can be found in the approver’s Document(s) Ready for Approval tile box. Additional approvers may also be added manually by the user submitting a document, or any of that document’s approvers.

Screenshot



Directions

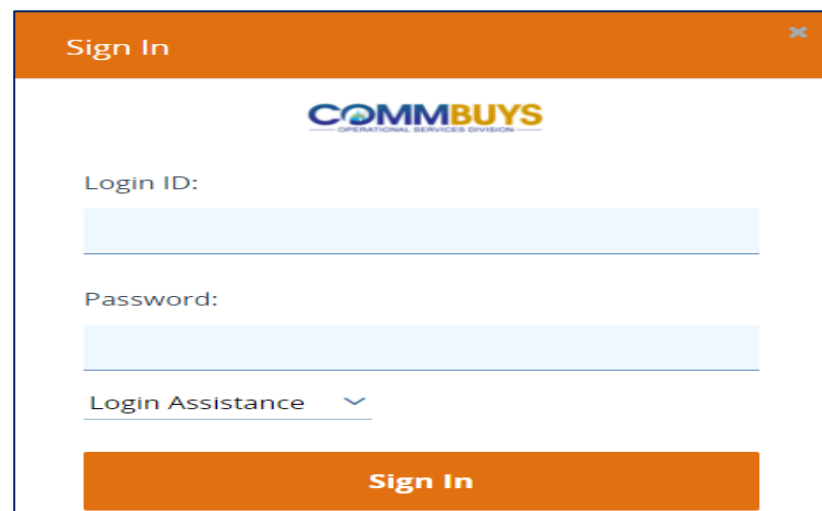
Step 1: Launching COMMBUYS

1. Launch the COMMBUYS website by entering the URL (**commbuys.com**) in the browser or by clicking the hyperlink [COMMBUYS](https://commbuys.com).
2. The COMMBUYS landing page displays. Click on the orange **Sign In** button in the upper right-hand corner.

Step 2: Signing In

1. Enter your **Login ID** and **Password**.
2. Click on the **Sign In** button.

NOTE: If you forget your User ID or Password, click on the **down arrow** next to **Login Assistance**.



Screenshot

Directions

The screenshot shows the COMMbuys dashboard. At the top, there are several status tiles: 'Document(s) Ready for Approval' (1), 'Requisition(s) Ready for Purchasing' (1), 'Bid Solicitation(s) Ready to Send' (3), 'Bid Solicitation(s) Ready to Open' (2), 'PO(s) Ready to Send' (0), and 'Change Order(s) Ready To Apply' (0). Below these tiles, there is a 'News' section with a table that currently has no items. To the right, there is a 'Recent Documents' section with a table listing documents.

Document #	Type	Description	Status	Last Viewed
RQ-21-1990-BIDS1-BIDS1-347039	Requisition	test approvals	Ready for Approval	09/17/2021
RQ-21-1990-BIDS1-BIDS1-347008	Requisition	umpac	In Progress	09/02/2021
RQ-21-1990-BIDS1-BIDS1-347007	Requisition	safety glove order	Gone to PO	09/01/2021
RQ-21-1990-BIDS1-BIDS1-347006	Requisition	pen and post it order	Gone to PO	09/01/2021
PO-18-1080-02003-SPO31-15098.1778	Purchase Order	pizza and chicken wing order	Sent	09/01/2021

Step 3: Opening the Document(s) Ready for Approval Tile Box

When a document is ready for your approval, it appears in the Document(s) Ready for Approval tile box. A document will appear in this box once it is your turn to review and approve (after prior approvers listed on your approval path, if applicable).

Click on the **Document(s) Ready for Approval** tile box.

The screenshot shows the 'Approval(1)' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Documents Pending My Approval'. This section contains a table with one document entry.

Requisition #	Requisition Date	Description	Account	Fiscal Year	Type
RQ-21-1990-BIDS1-BIDS1-347043	09/17/2021	test4	21		Release

Step 4: Opening the Document to be Approved

The **Approval** tab page opens and displays the list of all documents submitted by other users that require your approval in order to proceed.

Other document types within this section are available in other tabs.

In the **Documents Pending My Approval** section, click on the **blue hyperlink** of the document you wish to review and approve.

Step 5: Approving the Document

The **Summary** tab page of the selected document displays.

1. Review all the information on the Summary tab page. Any notes and attached files will display just beneath the **Header Information** section of this screen. You can also click on any tab to review information.
2. Scroll to the bottom of the page.

In the **Approval Paths** section, you can add approvers by clicking on the dropdown arrow in the **New Primary Approver** field, selecting an approver, and identify an approval sequence in the **Order Sequence** field.

You can also identify an approver to delete in the **Delete** column.

For either adding or deleting, click on the **Add/Delete Approver** button when finished.

In the **Approval Actions** section, there are three choices of radio buttons:

- **Approve** (the default)
- **Disapprove**
- **Cancel Requisition**

If you choose **Approve** there is a **Comment** field if you would like to enter a comment about the approval (optional for approvals).

If you choose **Disapprove** you **must** provide a reason in the **Comment** field and the requisition will be sent back to the requestor/purchaser to be fixed, and the status changes to **Returned**. After repair, the requisition can be re-submitted.

If you choose **Cancel Requisition**, the requisition will be completely canceled and you **must** provide a reason in the **Comment** field. After making your choice, click on the **Save & Exit** button to process your selection.

A box will appear with **Are you sure you want to <approve/disapprove/cancel> this <document type>?** Click on the **OK** button.

www.training.commbuys.com says
Are you sure you want to approve this requisition?

OK

Cancel

If approved, the status of the document changes from **Ready for Approval** to **Gone to PO** and a blue hyperlink for the PO number appears in the yellow box. If disapproved, the status changes to **Returned**, and if canceled, the status changes to **Canceled**.