

## Job Aid: How to Approve Documents

### This Job Aid shows how to:

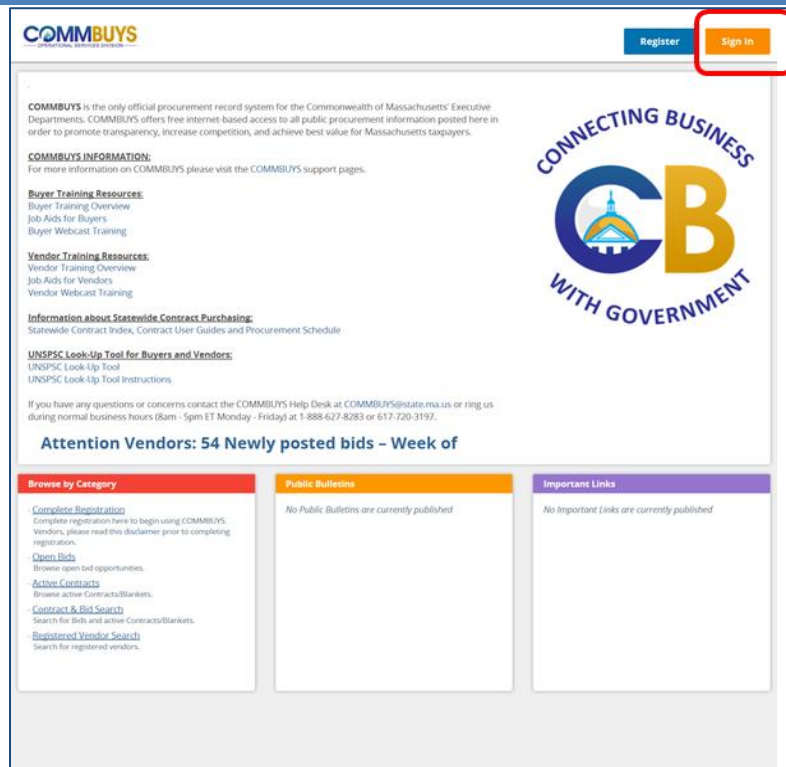
- Access “ready for approval” documents
- Approve, disapprove, and cancel documents routed for approval
- Add additional approvers to an approval path

### 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 user’s Control Center in the Approval tab waiting their review. Additional approvers may also be added manually by the user submitting a document, or any of that document’s approvers.

### Screenshot

### Directions



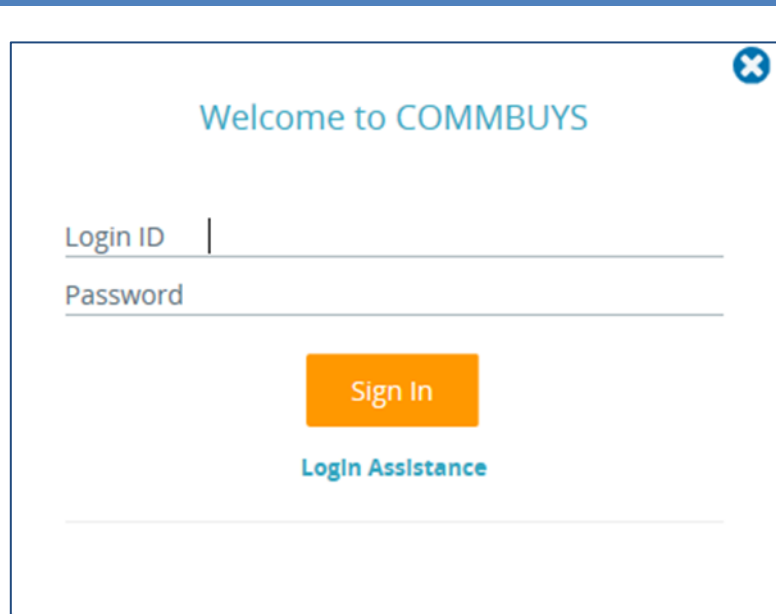
### Step 1: Log in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click the orange **Sign In** button in the upper right hand corner.

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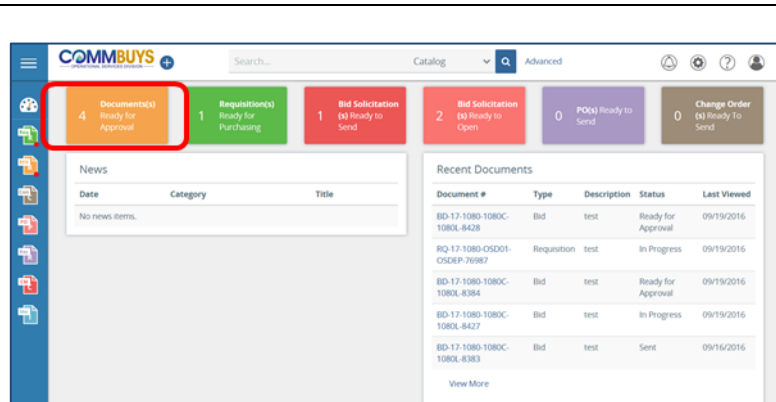
### Screenshot

### Directions



#### Step 2: Logging In

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



#### Step 3: Clicking the Documents Ready for Approval Box

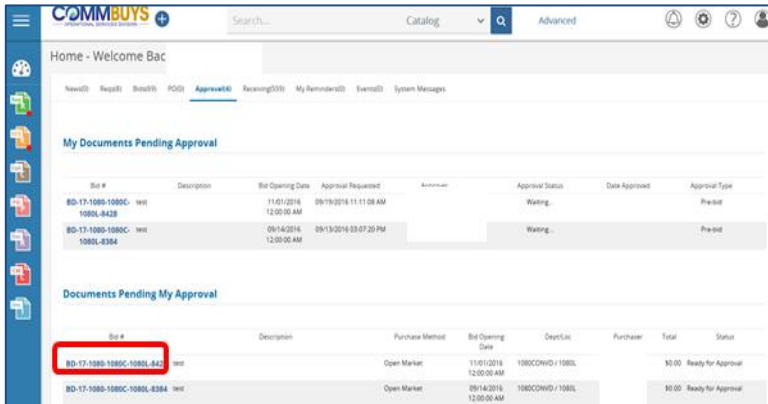
When a document is ready for your approval, it appears in the Documents Ready for Approval box. A document will appear in this box once it is your turn to review and approve (after prior approvers listed on your approval path, if applicable).

Click on the **Documents Ready for Approval** Box.

## Job Aid: How to Approve Documents

### Screenshot

### Directions



Bid #	Description	Bid Opening Date	Approval Requested	Approval Status	Date Approved	Approval Type
BD-17-1080-1080C-1080L-842B	Int	11/01/2016 12:00:00 AM	09/19/2016 11:11:08 AM	Waiting...		Pre-bid
BD-17-1080-1080C-1080L-838A	Int	09/14/2016 12:00:00 AM	09/13/2016 03:07:20 PM	Waiting...		Pre-bid

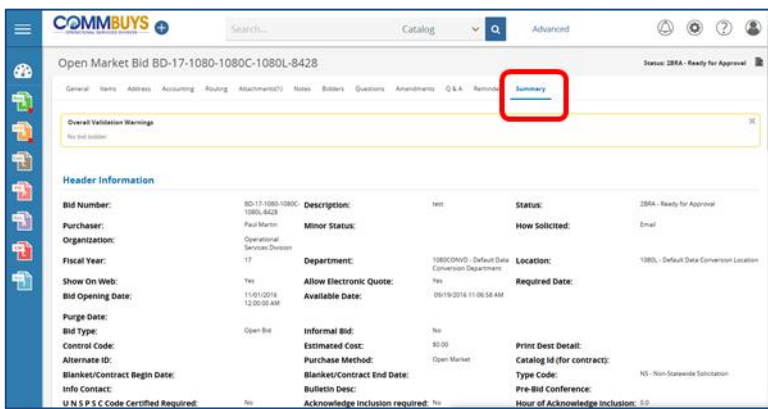
Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchase	Total	Status
BD-17-1080-1080C-1080L-842	Int	Open Market	11/01/2016 12:00:00 AM	1080CONVD / 1080L	\$0.00	\$0.00	Ready for Approval
BD-17-1080-1080C-1080L-838A	Int	Open Market	09/14/2016 12:00:00 AM	1080CONVD / 1080L	\$0.00	\$0.00	Ready for Approval

#### Step 4: Clicking the Document to be Approved

This page displays the list of all documents submitted by other users that require your approval in order to proceed.

Documents within this section are separated by document type.

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



Open Market Bid BD-17-1080-1080C-1080L-842B Status: 238A - Ready for Approval

General Home Address Accounting Routing Attachments(?) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Overall Validation Warnings  
No bid notices.

**Header Information**

<b>Bid Number:</b> BD-17-1080-1080C-1080L-842B	<b>Description:</b> Int	<b>Status:</b> 238A - Ready for Approval
<b>Purchaser:</b> Paul Martin	<b>Minor Status:</b>	<b>How Solicited:</b> Email
<b>Organization:</b> Operational Services Division	<b>Department:</b> 1080CONVD - Default Data Extension Department	<b>Location:</b> 1080L - Default Data Extension Location
<b>Fiscal Year:</b> 17	<b>Allow Electronic Quote:</b> Yes	<b>Required Date:</b>
<b>Show On Web:</b> Yes	<b>Available Date:</b> 09/19/2016 11:05:58 AM	
<b>Bid Opening Date:</b> 11/01/2016 12:00:00 AM		
<b>Purge Date:</b>	<b>Informal Bid:</b> No	<b>Print Desc Detail:</b>
<b>Bid Type:</b> Open Bid	<b>Estimated Cost:</b> \$0.00	<b>Catalog Id (for contract):</b>
<b>Control Code:</b>	<b>Purchase Method:</b> Open Market	<b>Type Code:</b>
<b>Alternate ID:</b>	<b>Blanket/Contract End Date:</b>	<b>Pre-Bid Conference:</b> No - Non-Statewide Solicitation
<b>Blanket/Contract Begin Date:</b>	<b>Bulletin Desc:</b>	<b>Hour of Acknowledge Inclusion:</b> 0:0
<b>Info Contact:</b>	<b>Acknowledge Inclusion required:</b> No	
<b>UN S P S C Code Certified Required:</b> No		

#### Step 5: Approving the Document

The summary 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 or delete approvers if desired.

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

- Approve (the default)
- Disapprove
- Cancel

There is also a Comment field if you would like to enter a comment about this approval. If you choose to disapprove or cancel you must provide a reason in the Comments field.

3. Since the default radio button is set to Approve, click the **Save & Exit** button to process your approval.

A box will appear "Are you sure you want to approve this <document type>? Click OK. The status of the document has been changed and no longer says "Ready for Approval".

**Approval Path**

Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
	1			1	09/19/2016 11:11 AM			

Add New Order Sequence **New Primary Approver** Add/Delete Approver

**Approval Actions**

Options:  Approve  Disapprove  Cancel Bid

Comment: \_\_\_\_\_

**Save & Exit**

Cancel Bid Clone Bid Print

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