

## Job Aid:

### How to Request a Procurement Exception in COMMBUYS CLM

#### This Job Aid shows how to:

- Request a Procurement Exception in COMMBUYS CLM

#### Of Special Note:

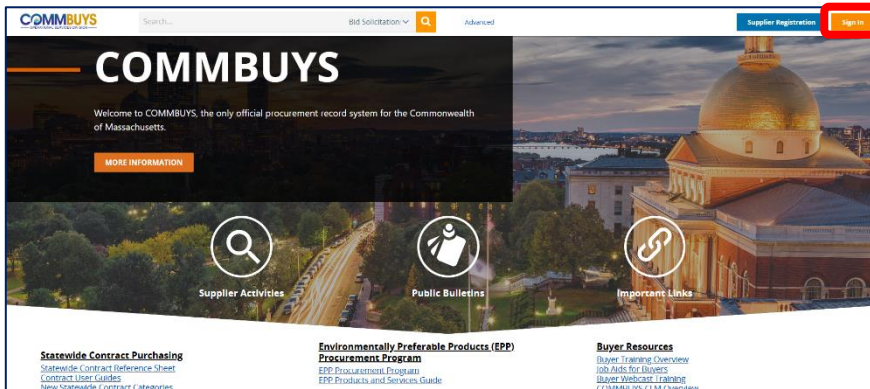
- Procurement exceptions (waivers) previously submitted to purchasing.agent@mass.gov have been transitioned to CLM as part of the Sourcing Strategy workflow. The process used to submit these requests through CLM is described in this job aid.
- Procurement exceptions require approval from OSD Legal and the Commonwealth Chief Procurement Officer.

### Screenshot

### Directions

#### Step 1: Logging in

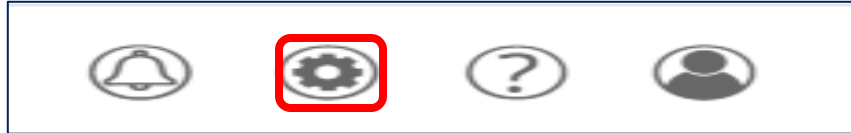
- Launch the COMMBUYS website by entering the URL [commbuys.com](https://commbuys.com)
- Click on the orange **Sign In** button in the upper right-hand corner.



- Click on the **SSO Login** (Single Sign-On) button.

- Enter your **Email Address** and **COMMBUYS Password** and click on the **Continue** button.

## Screenshot



|                     |
|---------------------|
| User Dashboard      |
| Reports             |
| Vendor Notification |
| Dashboard Reporting |
| G2B Punchout        |
| CLM Home            |

## Directions

### Step 2: Accessing CLM

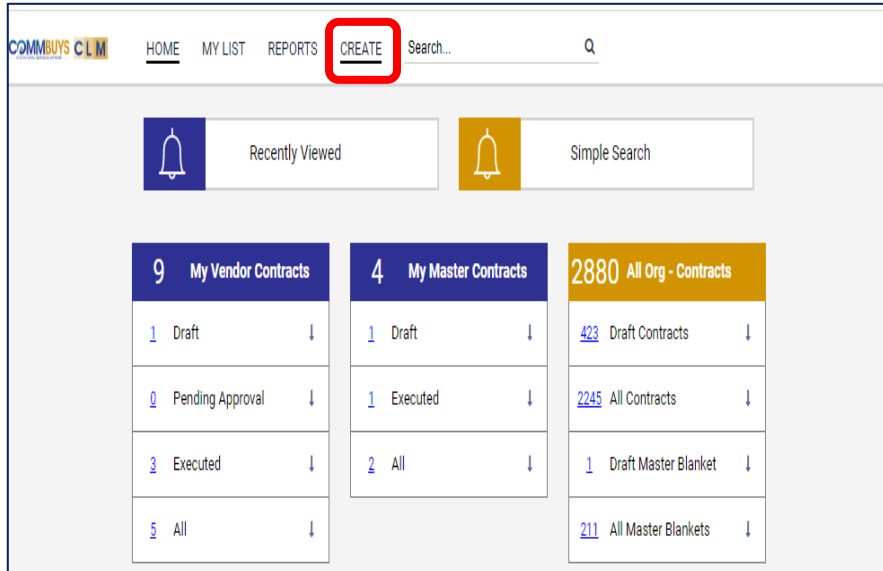
1. When the COMMBUYS home page displays, click on the **Settings** icon at the top right of the page.
2. Select **CLM Home** from the dropdown menu.

## Screenshot

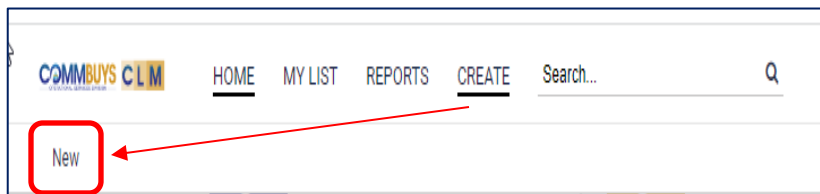
## Directions

### Step 3: Initiating a Sourcing Strategy

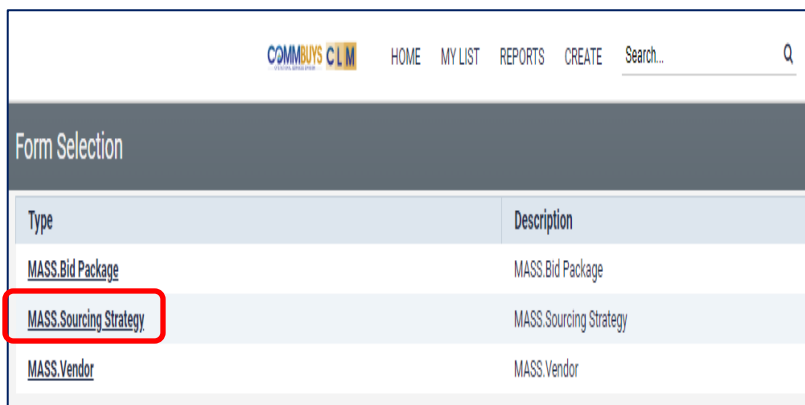
1. Click on the **Create** tab.



2. Click on the **New** hyperlink.



3. Click on the **MASS.Sourcing Strategy** hyperlink.



## Sourcing Strategy Details

**Type:** Select Option ▼ \*  
**Document Number:** \_\_\_\_\_  
**Title:** \_\_\_\_\_ \*  
**Description:** \*  
**Requestor:** Paul Martin \* Q  
**Agency:** Operational Services Division ▼ \* - 1080  
**Business Unit:** Select Option ▼  
**Estimated Amount:** \_\_\_\_\_

**Step 4: Completing the Sourcing Strategy Details Section**

**NOTE:** All required fields in CLM are identified with a red asterisk. After clicking on the **SAVE** button, any required fields not populated will be identified with a red message and must be completed.

1. In the **Type** field, click on the **down arrow** next to Select Option and select **Exception** from the dropdown menu.
2. In the **Document Number** field, enter the Statewide Contract number (OSD only) or your department contract number.
3. In the **Title** field, enter the title of the contract.
4. In the **Description** field, enter a description of the contract.
5. The **Requestor** field auto fills with your name.
6. The **Agency** field auto fills with your agency OR choose from the dropdown menu.
7. In the **Business Unit** field, click on the down arrow next to Select Option and select your business unit from the dropdown menu.
8. In the **Estimated Amount** field, enter the total anticipated value of the contract.

**Sourcing Strategy Dates**

Predecessor Contract: \_\_\_\_\_ 🔍

Contract Expiration Date: - -

**Planned Contract Start Date:** MM - DD - YYYY \* 📅

**Timeline**

|                                   |                |       |
|-----------------------------------|----------------|-------|
| Requested 360 Degree Data Report: | MM - DD - YYYY | * 📅   |
| 360 Degree Data Analyzed:         | MM - DD - YYYY | * 📅   |
| <b>EPP Check In:</b>              | MM - DD - YYYY | * 📅   |
| Catalog Model Review:             | MM - DD - YYYY | 📅     |
| Team Assembled:                   | MM - DD - YYYY | * 📅   |
| Kick-off Meeting:                 | MM - DD - YYYY | * 📅   |
| Review Recommendations:           | MM - DD - YYYY | * ? 📅 |
| Strategy Session:                 | MM - DD - YYYY | * 📅   |

### Step 5: Completing the Sourcing Strategy Dates Section

1. Use the magnifying glass search icon to select the predecessor contract in the **Predecessor Contract** field and enter the predecessor contract expiration date in the **Contract Expiration** field.  
**NOTE:** Leave these two fields blank if this is a new contract.
2. In the **Planned Contract Start Date** field, click on the calendar icon to enter the anticipated beginning date of the new contract.

**NOTE:** When the planned contract start date is entered, the required fields in the Timeline subsection will auto fill except for the **EPP Check In** field which must be entered manually. If not applicable, this date can be set to the same date as the **Requested 360 Degree Data Report**. (The calendar icon can be used to enter this date).

To continue this job aid go to:

- **Step 6** for exceptions to **Existing Statewide Contracts**

**NOTE:** This is an exception or “waiver” to the mandatory use of an existing statewide contract.

- **Step 7** for **Due Diligence** postings.
- **Step 8** for **Collective Purchases**
- **Step 9** for **Interim Contracts**
- **Step 10** for all **Other** reasons

**Exception Details**

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Reason for Exception:** Existing Statewide Contract ▼

Existing Statewide Contract: \_\_\_\_\_

**Details:**   
 \_\_\_\_\_

**Approval Requirements:**   
 \_\_\_\_\_

**Step 6: Completing the Exception Details Section for Existing Statewide Contracts**

1. Enter the contact person's name in the **Contact Name** field.
2. Enter the contact person's phone number in the **Phone** field.
3. Enter the contact person's email address in the **Email** field.
4. Click on the down arrow in the **Reason for Exemption** field and select **Existing Statewide Contract** from the dropdown menu.
5. Enter the Statewide Contract number in the **Existing Statewide Contract** field.
6. Enter details about the request for exception in the **Details** field.

**NOTE:** Consult the Best Value Procurement Handbook for guidance on what details to include.

7. The **Approval Requirements** field is for OSD input only.

**NOTE:** This field will be populated by OSD if approving a request but including requirements that must be met. Comments in this field will be included in the auto-generated email that goes to the requestor.

**Continue to Step 11**

## Screenshot

## Directions

### Step 7: Completing the Exception Details Section for Due Diligence Postings

1. Enter the contact person's name in the **Contact Name** field.
2. Enter the contact person's phone number in the **Phone** field.
3. Enter the contact person's email address in the **Email** field.
4. Click on the **down arrow** in the **Reason for Exemption** field and select **Due Diligence** from the dropdown menu.
5. Enter the company/entity name in the **Company/Entity** field.
6. Click on the **green and white plus sign icon** in the **Notice of Intent** field and select the Notice of Intent document from the saved location on your computer.
7. Enter the number of days for the notice to be posted in the **Posting Duration (days)** field.
8. Enter details about the request for exception in the **Details** field.
9. The **Approval Requirements** field is for OSD input only.

**NOTE:** This field will be populated by OSD if approving a request but including requirements that must be met. Comments in this field will be included in the auto-generated email that goes to the requestor.

**Continue to Step 11**

#### Exception Details

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Reason for Exception: Due Diligence ▼

Company/Entity: \_\_\_\_\_

Notice of Intent: 

Posting Duration (days): \_\_\_\_\_

Details:

Approval Requirements:

**Exception Details**

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Reason for Exception:** Collective Purchase ▼

Collective Organization Name: \_\_\_\_\_

Master Agreement Title: \_\_\_\_\_

Details:

Approval Requirements:

**Step 8: Completing the Exception Details Section for Collective Purchases**

1. Enter the contact person's name in the **Contact Name** field.
2. Enter the contact person's phone number in the **Phone** field.
3. Enter the contact person's email address in the **Email** field.
4. Click on the down arrow in the **Reason for Exemption** field and select **Collective Purchase** from the dropdown menu.
5. Enter the name of the collective organization in the **Collective Organization Name** field.
6. Enter the title of the master agreement in the **Master Agreement Title** field.
7. Enter details about the request for exception in the **Details** field.
8. The **Approval Requirements** field is for OSD input only.

**NOTE:** This field will be populated by OSD if approving a request but including requirements that must be met. Comments in this field will be included in the auto-generated email that goes to the requestor.

**Continue to Step 11**

## Screenshot

**Exception Details**

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Reason for Exception:** Interim Contract ▼

**Reason for Interim Contract:** Select Option ▼

**Expiring Contract Title:** \_\_\_\_\_

**Contract Expiration Date:** MM - DD - YYYY

**Details:**   
 \_\_\_\_\_

**Approval Requirements:**   
 \_\_\_\_\_

## Directions

### Step 9: Completing the Exception Details Section for Interim Contracts

1. Enter the contact person's name in the **Contact Name** field.
2. Enter the contact person's phone number in the **Phone** field.
3. Enter the contact person's email address in the **Email** field.
4. Click on the **down arrow** in the **Reason for Exemption** field and select **Interim Contract** from the dropdown menu.
5. Click on the **down arrow** in the **Reason for Interim Contract** field and select either **Early Termination** or **Procurement Delay** from the dropdown menu.
6. Enter the title of the expiring contract in the **Expiring Contract Title** field.
7. Enter the date that the contract will expire in the **Contract Expiration Date** field.
8. Enter details about the request for exception in the **Details** field.
9. The **Approval Requirements** field is for OSD input only.

**NOTE:** This field will be populated by OSD if approving a request but including requirements that must be met. Comments in this field will be included in the auto-generated email that goes to the requestor.

**Continue to Step 11**

**Exception Details**

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**Contact Name:**

**Phone:**

**Email:**

**Reason for Exception:**  ▼

**Details:**

**Approval Requirements:**

**Step 10: Completing the Exception Details Section for Other Reasons**

1. Enter the contact person's name in the **Contact Name** field.
2. Enter the contact person's phone number in the **Phone** field.
3. Enter the contact person's email address in the **Email** field.
4. Click on the down arrow in the **Reason for Exemption** field and select **Other** from the dropdown menu.
5. Enter details about the request for exception in the **Details** field.
6. The **Approval Requirements** field is for OSD input only.

**NOTE:** This field will be populated by OSD if approving a request but including requirements that must be met. Comments in this field will be included in the auto-generated email that goes to the requestor.

**Continue to Step 11**

**Contract Categories**

Contract Categories: Products and Services ▼

|   | Name                                                                              | Number of Vendors |
|---|-----------------------------------------------------------------------------------|-------------------|
| 1 |  |                   |

[+ Add Row](#) [- Remove Row](#)

### Step 11: Completing the Contract Categories Section

This section allows multiple categories within a contract to be identified.

1. In the **Contract Categories** field, click on the **down arrow** next to Select Option and select **Products, Services**, or **Products and Services** from the dropdown menu.
2. When identified, enter the name of the category in the **Name** column and enter the number of vendors, if known, within the category in the **Number of Vendors** column.

**NOTE:** Additional categories can be added and populated by clicking on the **Add Row** hyperlink. Clicking on the **Remove Row** hyperlink will delete any rows that are not needed.

3. Click on the **SAVE** button at the bottom of the page.

**NOTE:** if desired, you can complete the Sourcing Strategy document that can be shared in collaboration and be archived in COMMBUYS CLM by continuing with **Steps 12 through 16**.

If not, and you wish to proceed to the **Notes and Attachments** and **Approvals** sections, skip to **Step 17**.

**NOTE:** The **Notes and Attachments** section may be used to attach any documentation that supports the exception request.

## Screenshot

## Directions

### Step 12: Completing the Working Document Subsection

1. In the Document field, click on the **Template** hyperlink, then click on the .docx popup box on the corner of your screen.
2. When the template for the **Strategy Discussion** document displays, click on the **Enable Editing** button on the yellow stripe at the top of the document. Edit and update the document as needed then click on **File** and **Save As**.
3. When the **Save As** page displays, ensure that the desired save destination is selected, then rename the document in the top field, and click on the **Save** button on the right.
4. When the edited document re-displays, click on the **X** at the top right of the screen to close, and you are returned to the Working Document section.
5. Click on the **Upload Document** hyperlink.
6. Select the renamed document in the popup box, then click on the **Open** button.
7. When the screen re-displays, the edited document name has replaced the Template in the **Document** field.
8. Ensure that the **Data Injection** field is set to **YES**, then enter comments in the **Document Comments** field if desired.

Click on the **SAVE** button at the bottom of the page. The document is now hyperlinked.

**Sourcing Strategy Document**

**Working Document**

Document: [WTR001\\_STRTGY1667145\\_v1](#) [View PDF](#) [Upload Document](#)

Data Injection: ☒ YES

Document Comments:

**PROTECTED VIEW** Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

**Strategy Discussion**

New Contract [WTR001] - [Commercial and Recreational Watercraft]

**Recommendations**

- Overview of recommendations for new contract

**Current Contract**

Summary

- Commercial and recreational watercraft products and services

**Buyer Community/Sourcing Team Feedback**

- Positive aspects
- Complaints
- Plans to address in new contract?

**Save As**

Home Recent

Commonwealth of Massachusetts

Downloads

STRTGY1667145

Word Document (\*.docx)

Save

**Sourcing Strategy Document**

**Working Document**

Document: [WTR001\\_STRTGY1667145\\_v1](#) [View PDF](#) [Upload Document](#)

Data Injection: ☒ YES

Document Comments:

Organize New folder

Name Date modified Type Size

Today (2)

- WTR001\_STRTGY1667145\_v1 6/29/2022 8:41 AM Microsoft Word D... 48 KB
- STRTGY1667145 6/29/2022 8:30 AM Microsoft Word D... 40 KB

Yesterday (6)

- MBT1666482 (1) 6/28/2022 11:54 AM Microsoft Edge P... 291 KB
- WTR100\_RFR\_v1\_BIDPKG1666684 (2) 6/28/2022 11:53 AM Microsoft Edge P... 80 KB
- CON1667107 6/28/2022 11:18 AM Microsoft Edge P... 580 KB
- MBT1666482 6/28/2022 11:16 AM Microsoft Edge P... 4,910 KB
- MBT1666482 6/28/2022 10:23 AM Microsoft Edge P... 377 KB

Last week (14)

- WTR100\_RFR\_v1\_BIDPKG1666684 (2) 6/24/2022 11:17 AM Microsoft Word D... 12 KB
- BIDPKG1666684 (2) 6/24/2022 9:55 AM Microsoft Word D... 231 KB
- WTR100\_RFR\_v1\_BIDPKG1666684 (1) 6/24/2022 9:54 AM Microsoft Word D... 214 KB
- BIDPKG1666684 (1) 6/24/2022 9:49 AM Microsoft Word D... 231 KB
- WTR100 v1 BIDPKG1666684 6/24/2022 9:38 AM Microsoft Word D... 214 KB
- WTR100 v1 BIDPKG1666684 6/24/2022 8:05 AM Microsoft Word D... 228 KB

File name: WTR001\_STRTGY1667145\_v1

Open Cancel

**Sourcing Strategy Document**

**Working Document**

Document: [WTR001\\_STRTGY1667145\\_v1.docx](#) [Replace](#) [Remove](#)

Data Injection: ☒ YES

Document Comments:

Working Document Collaboration

Status: Not Started [EDIT](#) [SHARE](#) ?

Due Date: MM - DD - YYYY [Comments:](#)

Send Reminders: YES ☒ ?

| External User            | Name                 | Email                | Permission ?    | Status        |
|--------------------------|----------------------|----------------------|-----------------|---------------|
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | Select Option ▼ | Not Started ▼ |

[+ Add Row](#) [Remove Row](#)

### Step 13: Completing the Working Document Collaboration Subsection

**NOTE:** At various stages in the **Contract Lifecycle Management** process, collaboration occurs among members of your Strategic Sourcing Team (SST).

1. The Status **Not Started** displays. Enter a date that collaboration comments will be due in the **Due Date** field.
2. Enter comments about the collaboration in the **Comments** text box.
3. Ensure that **YES** displays in the **Send Reminders** field.

**NOTE:** Collaborators can include users who are either external or internal to your work group.

- To add an external collaborator, go to **Step 9**.

To add an internal collaborator, go to **Step 15**.

Working Document Collaboration

Status: Not Started   ?

Due Date: MM - DD - YYYY  Comments:

Send Reminders: YES ☒ ?

| External User | Name | Email | Permission ?    | Status        |
|---------------|------|-------|-----------------|---------------|
|               |      |       | Select Option ▼ | Not Started ▼ |

**Permission** ?

Select Option ▼

- Select Option
- Edit
- Comment
- Read Only

**Status**

Not Started ▼

- Not Started
- Shared
- Completed
- Not Completed

#### Step 14: Adding an External Collaborator

1. Select the **External User** checkbox.
2. Enter the collaborator's **Name** and **Email** address in the respective fields.

**NOTE:** The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.

3. Click on the **down arrow** in the **Permission** column and select:
  - **Edit** - if the user will have the ability to edit the document.
  - **Comment** – if the user cannot edit the document but can enter comments about it.
  - **Read Only** – if the user can review the document but cannot edit or enter comments.

**NOTE:** The Status column displays Not Started for each user prior to the start of the collaboration. The system will automatically update the status as it changes.

**Go to Step 15 to add an Internal Collaborator; otherwise go to Step 16.**

## Screenshot

## Directions

### Step 15: Adding an Internal Collaborator

1. Click on the **magnifying glass** search icon.
  2. In the **Lookup – Collaborator Name** popup box, if the desired user displays continue with step 4 below; if not, click on the down **triangle** in the **Full Name** column to search for the user by name.
  3. In the **Filter By: Full Name** popup box, enter the collaborator's name, then click on the **OK** button.
  4. When the **Lookup – Collaborator Name** popup box re-displays, click on the **right arrow** in the **Select** column.
- NOTE:** Do not click on the USER hyperlink in the Form Number column.
5. The selected internal collaborator's **Name** and **Email** address now display in the respective fields.

**NOTE:** The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.

| Name                                                                              | Title | Status       | Due Date       | Notes |
|-----------------------------------------------------------------------------------|-------|--------------|----------------|-------|
|  |       | Not Required | MM - DD - YYYY |       |

Lookup - Collaborator Name[1]

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

| Select | Form Number ↑↓ | Full Name ↑↓ | Email Address ↑↓ |
|--------|----------------|--------------|------------------|
|        |                |              |                  |

Filter By : Full Name

OK CANCEL

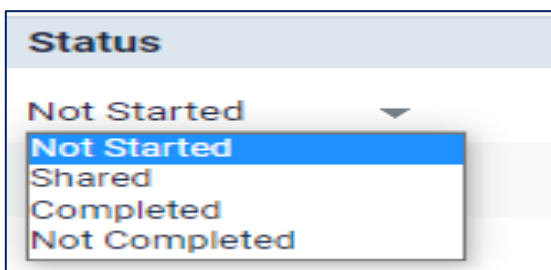
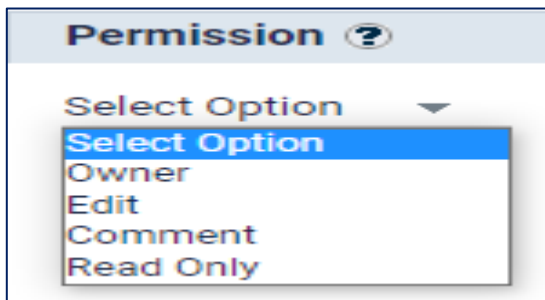
Lookup - Collaborator Name[1]

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

| Select                                                                              | Form Number ↑↓                                                                                                  | Full Name ↑↓   | Email Address ↑↓       |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|----------------|------------------------|
|  |  <a href="#">USER1645611</a> | Renee O'Rourke | renee.orourke@mass.gov |

| External User                                                                       | Name           | Email                                                                                                      | Permission ?  | Status      |
|-------------------------------------------------------------------------------------|----------------|------------------------------------------------------------------------------------------------------------|---------------|-------------|
|  | Renee O'Rourke |  renee.orourke@mass.gov | Select Option | Not Started |

+ Add Row Remove Row



6. Click on the **down arrow** in the **Permission** column and select:

- **Edit** - if the user will have the ability to edit the document.
- **Comment** – if the user cannot edit the document but can enter comments about it.
- **Read Only** – if the user can review the document but cannot edit or enter comments.

**NOTE:** The Status column displays Not Started for each user prior to the start of the collaboration. The system will automatically update the status as it changes.

## Screenshot

## Directions

### Step 16: Starting the Collaboration Process

1. Click on the **EDIT** button. Doing so adds your name to the list of collaborators.
2. Click on the **New Task** button on the left side of the page.
3. When the New Task section redisplay, click in the **text box** and enter a task.
4. Click on the **down arrow** in the **Assigned To:** field and select a collaborator for the assigned task.
5. Click on the **Create Task** button.

**NOTE:** The New Task screen re-displays with the entered information.

6. Click on the **GO TO RECORD** button at the bottom of the **Strategy Document** page to return to the **Working Document Collaboration** subsection. The status is **Draft**.
7. Click on the **SHARE** button.

Working Document Collaboration

Status: Not Started **EDIT** **SHARE** ?

Due Date: MM - DD - YYYY Comments:

Send Reminders: YES ☒ ?

| External User            | Name | Email | Permission ?  | Status      |
|--------------------------|------|-------|---------------|-------------|
| <input type="checkbox"/> |      |       | Select Option | Not Started |

+ Add Row Remove Row

Tasks

0 Tasks **New Task**

Type task here. You can highlight a text area in the document to link to your task.

Assigned To: Renee O'Rourke

**Create Task** Cancel

Tasks

1 Tasks **New Task**

Status Assignee

To: Renee O'Rourke / By: Paul Martin  
6/29/2022 11:28 AM

Assigned

Task: Please edit.

Add Reply

COMPLETE REVIEW **SHARE DOCUMENT** **GO TO RECORD**

Working Document Collaboration

Status: Draft **EDIT** **SHARE** **COMPLETE** **CANCEL** ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ☒ ?

| External User                       | Name           | Email                  | Permission ? | Status      |
|-------------------------------------|----------------|------------------------|--------------|-------------|
| <input checked="" type="checkbox"/> | Renee O'Rourke | renee.orourke@mass.gov | Edit         | Not Started |
| <input checked="" type="checkbox"/> | Paul Martin    | paul.g.martin@mass.gov | Owner        | Not Started |

+ Add Row Remove Row

## Screenshot

Working Document Collaboration

Status: **Shared** **EDIT** **REPLACE WORKING DOCUMENT** **COMPLETE** **CANCEL** **NOTIFY SHARED COLLABORATORS** ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ?

2 collaborators | 0 currently online

| External User                       | Name           | Email                  | Permission ? | Status |
|-------------------------------------|----------------|------------------------|--------------|--------|
| <input checked="" type="checkbox"/> | Renee O'Rourke | renee.orourke@mass.gov | Edit         | Shared |
| <input checked="" type="checkbox"/> | Paul Martin    | paul.g.martin@mass.gov | Owner        | Shared |

+ Add Row Remove Row

Completing Collaboration

If the document contains redlines and/or comments, they will be retained in the working document if they are not resolved.

**OK** CANCEL

Working Document Collaboration

Status: **Completed** **EDIT** **SHARE** ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ?

| External User                       | Name           | Email                  | Permission ? | Status    |
|-------------------------------------|----------------|------------------------|--------------|-----------|
| <input checked="" type="checkbox"/> | Renee O'Rourke | renee.orourke@mass.gov | Edit         | Completed |
| <input checked="" type="checkbox"/> | Paul Martin    | paul.g.martin@mass.gov | Owner        | Completed |

+ Add Row Remove Row

## Directions

**NOTE:** The status has now changed to **Shared**. An invitation to edit has been sent to all collaborators. The owner can see if there any collaborators currently in the document.

Once Shared, two new buttons appear.

- **Replace Working Document:** If edits were made, you can replace the document in the section above.
- **Notify Shared Collaborators:** will send a reminder to those who haven't completed the review.

8. Click on the **COMPLETE** button once the collaboration is completed and the working document has been replaced.

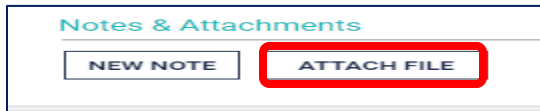
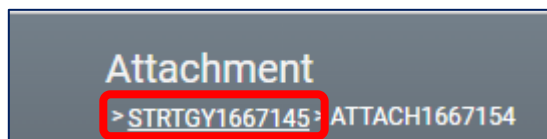
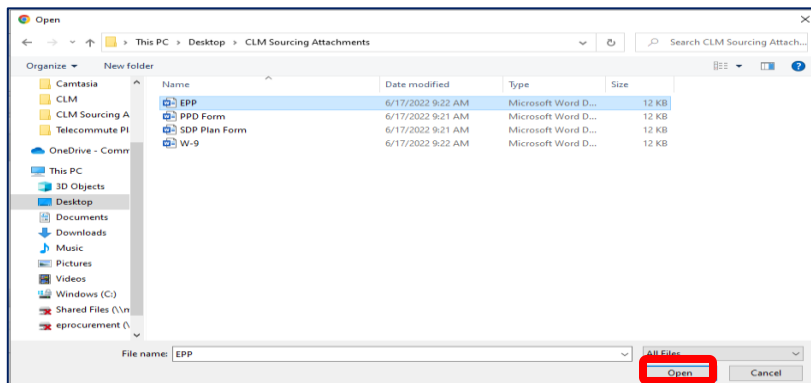
9. Click on the **OK** button in the **Completing Collaboration** popup box.

10. The status changes to **Completed**.

Now scroll down and click on the **Notes & Attachments** section.

**Step 17: Completing the Notes & Attachments Section**

**NOTE:** The **Notes and Attachments** section may be used to attach documentation that supports the exception request or any other relevant documents if desired; otherwise, skip to **Step 18**.

1. Click on the **ATTACH FILE** button.
2. On the **Attachments** screen, enter the Title of the document to be attached.
3. Click on the **green and white plus sign** icon.
4. When the Downloads screen displays, go to the location on your computer where you have saved the document, select it, and click on the **Open** button. The document name displays in the **File:** field.
5. Add a description if desired in the **Description:** text box.
6. Click on the **SAVE** button at the bottom of the page.
7. Click on the **STRTGY** hyperlink beneath the word Attachment in the title bar at the top of the page to return to the Sourcing Strategy page.

## Screenshot

## Directions

### Step 18: Completing the Approvers Section

1. Select either **Serial** (sequential) or **Parallel** (simultaneous) from the dropdown menu in the **Approval Method** field.
2. In the **Submitted For Approval By:** section, click on the **magnifying glass** search icon.

In the **Lookup- Approver Name** popup screen, click on the right arrow in the **Select** column next to the name of your desired approver.

**NOTE:** Your approver name may also be searched for using the down arrows in the **First Name** or **Last Name** columns.

3. Add a requested due date for approval in the **Due Date** column. To add additional approvers, click on the **Add Row** hyperlink and repeat the process.

**NOTE:** The **ACPO** and **Agency Head**, fields are not required at this time.

Approvers

Approval Method: Serial

Submitted For Approval By:

| Name | Title | Status       | Due Date       | Notes |
|------|-------|--------------|----------------|-------|
|      |       | Not Required | MM - DD - YYYY |       |

+ Add Row Remove Row

ACPO Approval: Not Required

Agency Head Approval: Not Required

CCPO Approval: Not Required

Lookup - Approver Name[1]

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

| Select | First Name | Last Name | Title                              | Email Address                 |
|--------|------------|-----------|------------------------------------|-------------------------------|
| ⊞      | MASS       | Approver  |                                    | mbusby@test2.ascontracts.com  |
| ⊞      | Alice      | Approver  |                                    | mbusby@test2.ascontracts.com  |
| ⊞      | QA MASS    | Approver  |                                    | mbusby@test2.ascontracts.com  |
| ⊞      | Wick       | Webber    | Devops                             | wick.webber@mdfcommerce.com   |
| ⊞      | Marianne   | Eid       | BA                                 | marianne.eid@mdfcommerce.com  |
| ⊞      | Donna      | Webster   | BA                                 | donna.webster@mdfcommerce.com |
| ⊞      | Tim        | Kennedy   | Strategic Sourcing Senior Manager  | tim.kennedy@mass.gov          |
| ⊞      | Rajiv      | Singh     | Technical Lead                     | rajiv.singh@mass.gov          |
| ⊞      | Julia      | Wolfe     | Director, Environmental Purchasing | julia.wolfe@mass.gov          |

Approvers

Approval Method: Serial

Submitted For Approval By:

| Name        | Title                      | Status  | Due Date       | Notes          |
|-------------|----------------------------|---------|----------------|----------------|
| Julia Wolfe | Director, Environmental Pt | Require | 06 - 29 - 2022 | Please approve |

+ Add Row Remove Row

**OSD Legal**

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**Name:** \_\_\_\_\_  

**Due Date:** MM - DD - YYYY 

**Notes:**

**CCPO**

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**Name:** \_\_\_\_\_  

**Due Date:** MM - DD - YYYY 

**Notes:**

 **SAVE**
 **SUBMIT FOR APPROVAL**
 **WITHDRAW**





4. Add the legal approver (**Nicole St. Pierre**) in the **OSD Legal** subsection by repeating sub-steps 2 and 3 above.
  
5. Add the Commonwealth Chief Procurement Officer in the **CCPO** subsection by repeating sub-steps 2 and 3 above
  
6. Click on the **SAVE** button at the bottom of the page.
  
7. Click on the **SUBMIT FOR APPROVAL** button at the bottom of the page.

**NOTE:** Once approval is received, the status changes to **Approved**.

**For Due Diligence and exceptions to purchase from Statewide Contracts,** you must proceed to creating a bid package in **COMMBUYS/CLM** as outlined in the Buyer Job Aid “How to Create a Bid Package in COMMBUYS/CLM.”