

Step-by-Step Instructions for Creating an Approval Type

- ▲ Approval types and rules determine the unique approval path a purchase requisition needs to go through in order to be approved with Ohio Buys. The agency approval path a purchase requisition follows is based on variables such as the site associated with the purchase requisition, chartfields, commodity codes, type, and/or dollar amount.
- ▲ Agency and State Administrators are able to view approval types and approval rules, while only State Administrators can make updates. If an Agency Administrator wish to make changes to their approval paths, they will need to create an OSS Help Desk ticket and attach an updated rules engine spreadsheet.
- ▲ When managing agency approval paths, please keep the following in mind:
 - Approval types must be created before an approval rule is created. Approval types are created to capture an agency's unique approval needs. Within an approval type, multiple approval rules can be grouped in order to create an approval pathway. The approval type is the umbrella over a group of approval rules (e.g., Agency Procurement Approver, Fiscal Agency Approver, Final Agency Approver).
 - Agency and State Administrators can create approval rules once an approval type has been established. Approval rules control where a purchase requisition is routed based on variables such as location, type, dollar amount, chartfields and/or commodity. Multiple approval rules can and should be created and linked to an approval type.

1

Log in to Ohio Buys. From the Main Menu Navigation bar, click **Approvals** and then select **Manage Types** from the drop-down menu.

2

From the Manage Approval Types page, click **Add New Type**.

3

Populate the following fields:

- a) **Category:** Final Approval, Fiscal, or Procurement.
- b) **Agency:** which agency this approval type is for.
- c) **Approval Type:** a description of what the approval type is for.
- d) **Order:** defines the order that the rules are applied (lower before higher). For example, Agency Procurement Approver has a Type Order of 1 and Agency Fiscal Approver has a Type Order of 2.

The screenshot shows a 'New Type' form with the following fields: ID (text input), Category (dropdown menu), Agency (dropdown menu), Order (text input), and Status (dropdown menu). The Status field is currently set to 'Valid'. A red rectangular box highlights the ID, Category, Agency, and Order fields.

4

Click **Save & Close**.

Step-by-Step Instructions for Creating an Approval Rule

1 Log in to Ohio Buys. From the Main Menu Navigation bar, click **Approvals** and then select **Manage Rules** from the drop-down menu.

2 From the Manage Rules page, click **Add a Rule**.

3 Populate the following fields:

- a) **Approval Type:** the associated approval type.
- b) **PR Type:** the associated type of requisition (e.g., Standard, After-the-Fact, etc.).
- c) **Order:** defines the order that the rules are applied (lower before higher) .
- d) **Threshold From:** The low end of the dollar threshold that the rule applies to.
- e) **Threshold To:** the high end of the dollar threshold that the rule applies to.
- f) **Main Organization:** the agency, division, or site that the rule applies to.
- g) **Approvers:** approvers for this rule.

In addition, the following information can also be indicated: Commodity, Account From and Account To, Fund From and Fund To, ALI, Agency Use, Operating Unit, Department, Agency Use, and additional Department Levels.

The screenshot shows the 'Add Approval Rule' form with three main sections: General, Budget, and Organization. Callouts A through G are placed over the following fields:

- A:** Approval Type *
- B:** PR Types *
- C:** Order *
- D:** Threshold From *
- E:** Threshold To *
- F:** Main Organization *
- G:** Approvers *

Other visible fields include: Rule ID, Commodity, Status *, Account From, Account To, State of Ohio: Fund From, State of Ohio: Fund To, State of Ohio: ALI, State of Ohio: Operating Unit, State of Ohio: Department, State of Ohio: Report, State of Ohio: Agency Use, and Department Levels 4 through 8.

4 Click **Save & Close**.

Step-by-Step Instructions for Updating Approval Rules

1 Log in to Ohio Buys. From the Main Menu Navigation bar, click **Approvals** and then select **Manage Rules** from the drop-down menu.

2 From the Manage Rules page, search for the rule you would like to edit. You are able to search by Keywords, Location, and associated Approval Type. Once you find the rule you would like to edit, click the **Pencil** (✎) icon next to the rule.

Edit the following fields as necessary. For example, you may want to change the listed Approvers for a rule:

- a) **Approval Type:** the associated approval type.
- b) **PR Type:** the associated type of requisition (e.g., Standard, After-the-Fact, etc.).
- c) **Order:** defines the order that the rules are applied (lower before higher) .
- d) **Threshold From:** The low end of the dollar threshold that the rule applies to.
- e) **Threshold To:** the high end of the dollar threshold that the rule applies to.
- f) **Main Organization:** the agency, division, or site that the rule applies to.
- g) **Approvers:** approvers for this rule.

In addition, the following information can also be updated: Commodity, Account From and Account To, Fund From and Fund To, ALI, Operating Unit, Department, Agency Use, and additional Department Levels.

3

The screenshot shows the 'Add Approval Rule' form with the following fields highlighted by callouts:

- A:** Rule ID (19)
- B:** Approval Type (ADJ - Procurement)
- C:** PR Types (Standard Purchase)
- D:** Threshold From (0.00)
- E:** Threshold To (999,999,999.99...)
- F:** Main Organization (ADJ-Adjutant General)
- G:** Approvers (SHADBURN JEFFREY, WHALEN KELLI)

4 Click **Save & Close**.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (ohiosharedservices@ohio.gov) or phone (877-644-6771).