Ohio | Buys

How to Update the Rules Engine

Step-by-Step Instructions for Updating/Deleting Existing Rules

- Agencies will have the opportunity to define requisition approvals based on specific rules of their choosing. Agency Admins should initiate changes to the approval rules by emailing ohiosharedservices@ohio.gov.

- There are two separate processes that require two different templates for updating/deleting existing rules vs. creating new rules. The State Admin assigned to the OSS case will provide the appropriate template and instructions based on the situation.

- Each row in the rules engine table will represent a "rule“. If a requisition is created in Ohio Buys that contains the specific values listed in the rule, it will route for approval to all of the approvers listed in the adjacent "Login ID Approver" columns.

- A few things to note when updating the rules engine:
  - The existing rules should be reviewed prior to any updates. The State Admin assigned to the OSS case will extract all of the existing rules per Agency per requisition type. If updating rules for multiple requisition types, then multiple files wil need to be extracted.
  - Rules can differ by agency and also within the same agency by changing details such as the commodity type, chartfield info, or requisition type. Rules with the same characteristics (e.g. same requisition type) can be set up to execute in a specific order by leveraging the **Order** column.
  - The rules **Order** column will be leveraged if the exact same rule parameters are listed as multiple rows in the template with different, sequential approvers.
    - For example DRC has 2 sequential approvers required for an IT commodity, this would need to be listed as two separate rows where one had an order of 10 and the next an order of 20 with each user listed separately in each row.
  - When creating or updating a rule, only the required fields are need to be populated (e.g. if you do not have a need for commodity approvers, leave the commodity column blank).
  - Some agencies will have various combinations of approvers based on different scenarios. In order to ensure that there is at least one rule to cover all scenarios, the **Safety Net** approval category exists.

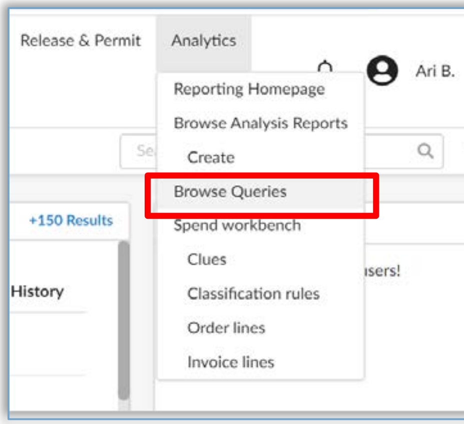
- When the spreadsheet is completed and ready to be loaded into the system, an OSS ticket should be submitted that contains the spreadsheet as an attachment.

How to Update the Rules Engine

Step-by-Step Instructions for Updating/Deleting Existing Rules

1 To initiate a change to existing approval rules, the Agency Admin should email ohiosharedservices@ohio.gov indicating that changes to existing rules are needed or existing rules need to be deleted. A State Admin will be assigned to the case.

2 The State Admin will log into Ohio Buys. Navigate to **Analytics>Browse Queries**.



3 Under **Keywords**, type “CLF” and click the **Search** button.

4 Select the excel ( ) icon next to the query with code “CLF”.

5 In the pop up window, select the agency name and the requisition type.

⚠ If updates to multiple PR types is needed, multiple queries will need to be run and extracted.

6 Click the **Extract** button.

7 The State Admin will send the excel spreadsheet to the Agency Admin through the case management process.

Step-by-Step Instructions for Updating/Deleting Existing Rules

8

After downloading the spreadsheet, the Agency Admin should update the columns as needed.

- **Rows should not be deleted or added to the spreadsheet!**
- If a rule needs to be deleted, the **Status** column should be updated to read "del".
- If a rule needs to be created, the process for adding new rules should be followed (page 7)

a) **Rules ID:** The auto-assigned number for the rule within Ohio Buys. This value should not be changed.

b) **Status:** Indicates whether the rule is active (val) or inactive (del). If a rule should be deleted, the status should be edited.

c) **Agency:** Enter the agency to which the rule belongs (e.g. Commerce)

d) **Performer_Type:** List the approver type (e.g. Fiscal Approver, Final Approver)

e) **Rules_ID_Type:** List the approver type (e.g. Fiscal Approver, Final Approver)

f) **Rules_Order:** List the numerical order in which the rule should be processed

- The **Rules_Order** column will be leveraged if the exact same rule parameters are listed as multiple rows in the template with different, sequential approvers.
  - For example DRC has 2 sequential approvers required for an IT commodity, this would need to be listed as two separate rows where one had an order of 10 and the next an order of 20 (column C) with each user listed separately in each row.

g) **Orga:** List Orga Node (Agency, Division or Site). If General Agency rule, put Agency Node. If not, enter the location (Division or Site in which this performer belongs to).

h) **Agency_Use:** Chart of Account Segment. Populate this column with a specific Agency Use value if your agency expects to drive approvals based on this segment.

i) **ALI:** Chart of Account Segment. Populate this column with a specific ALI value if your agency expects to drive approvals based on this segment.

j) **DEP:** Chart of Account Segment. Populate this column with a specific Department value if your agency expects to drive approvals based on this segment.

k) **Fund_From:** Chart of Account Segment. Populate this column with a specific Fund value if your agency expects to drive approvals based on this segment.

l) **Fund_To:** If you are going to use a fund rule, please populate both **Fund_From** and **Fund_To**

m) **Operating_Unit:** Chart of Account Segment. Populate this column with a specific Operating Unit value if your agency expects to drive approvals based on this segment.

Ohio | Buys

How to Update the Rules Engine

Step-by-Step Instructions for Updating/Deleting Existing Rules

8

n) **Program:** Chart of Account Segment. Populate this column with a specific Program value if your agency expects to drive approvals based on this segment.

o) **Project_Grant:** Chart of Account Segment. Populate this column with a specific Grant value if your agency expects to drive approvals based on this segment.

p) **Report:** Chart of Account Segment. Populate this column with a specific Report value if your agency expects to drive approvals based on this segment.

q) **Service_Location:** Chart of Account Segment. Populate this column with a specific Service Location value if your agency expects to drive approvals based on this segment.

r) **Account_From:** Chart of Account Segment. Populate this column with a specific Account Code value if your agency expects to drive approvals based on this segment.

s) **Account_To:** If you are going to use an account rule, please populate the **Account_From** and the **Account_To**

t) **Budget_Reference:** Chart of Account Segment. Populate this column with a specific Budget Reference value if your agency expects to drive approvals based on this segment.

u) **UNSPSC:** Populate this column with a specific Commodity number value (e.g. 43000000) if your agency expects to drive approvals based on this field.

v) **Req_Type:** There are three possible requisition types in eProcurement where an Agency can define approvals (Standard purchase, Emergency, After the Fact, Blanket/Encumbrance Order). If same approvers for each type, enter separate lines.

w) **Threshold_Lower:** If an agency does not have a need for threshold amount (dollar value), then put 0 to 999,999,999,999

x) **Threshold_Upper:** If an agency does not have a need for threshold amount (dollar value), then put 0 to 999,999,999,999

y) **Login_User_X:** Actual user's eProcurement OHID (e.g. 10120210)

z) **Require_All_Approval:** Rules engine will route PR to all approvals per rule/row sequentially. When they approve, PR will move on. If all need to approve due to special circumstance, mark this column 'yes'.

aa) **Comments:** Provide comments that reviewers of this document need to know.

bb) **Dept Codes:** List Orga Node that IS NOT an Agency, Division, or Site.

9

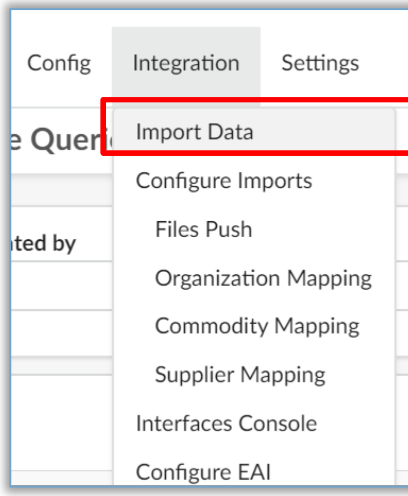
After making the necessary updates, the spreadsheet should be returned to the State Admin using the case management process.

Ohio | Buys

How to Update the Rules Engine

Step-by-Step Instructions for Updating/Deleting Existing Rules

10 After receiving the spreadsheet with the updates to existing rules, the State Admin should log into Ohio Buys. Navigate to **Integration>Import Data**.



11 Click **Create Import**.

12 Under the **Keywords** field, search for the import with code "oh_rules_engine_load_dep_update".

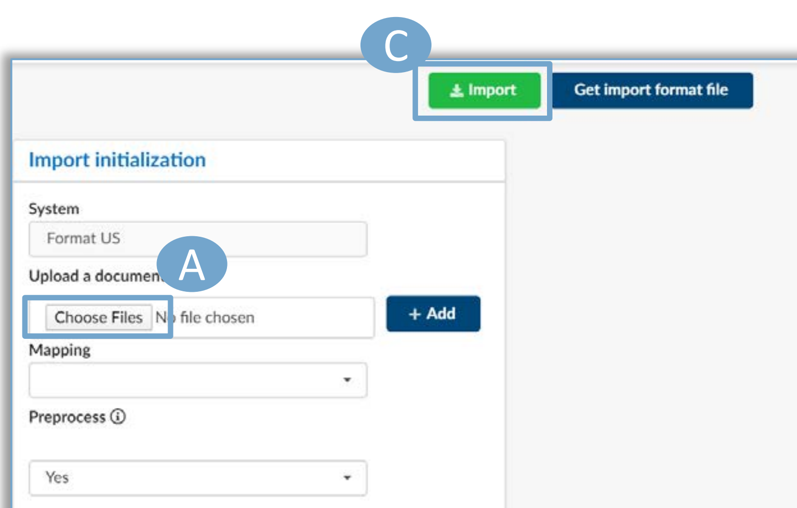
13 Click the edit ( ) icon next to the import name.

14 To upload the excel spreadsheet:

a) Click **Choose Files**

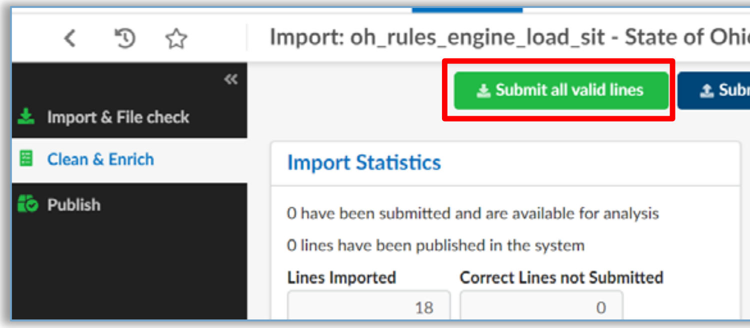
b) Select the document within the file sorter window

c) Click **Import**

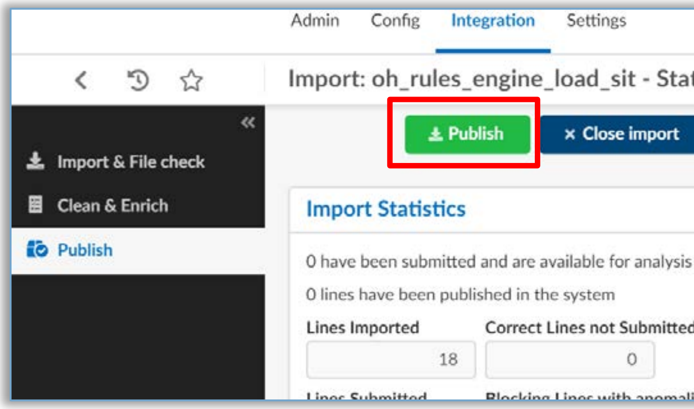


Step-by-Step Instructions for Updating/Deleting Existing Rules

15 On the **Clean & Enrich** tab, click **Submit all valid lines**.



16 On the **Publish** tab, click **Publish**.



17 Select **x Close Import**.

Ohio | Buys

How to Update the Rules Engine

Step-by-Step Instructions for Creating New Rules

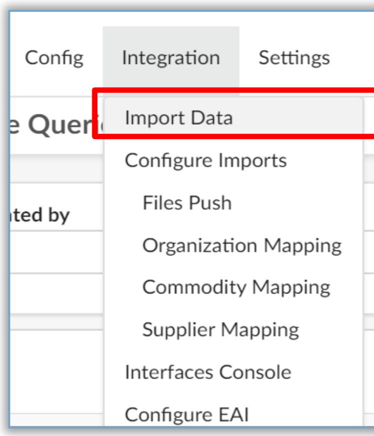
1

To initiate a request to add new rules, the Agency Admin should email ohiosharedservices@ohio.gov indicating that changes to existing rules are needed or existing rules need to be deleted. A State Admin will be assigned to the case.

- ⚠ The State Admin should pull all existing rules and send to the Agency Admin for review prior to adding new rules (reference Page 1 for instructions).
- ⚠ For large-scale organizational changes that require restructuring all rules within the agency, the Agency Admin should set statuses for all of the rules to "del". The State Admin can then import that file to clear all rules for the agency which will allow them to build the rules from scratch.
- ⚠ For small organizational changes, it is only necessary to follow Steps 2-15 to add new rules without deleting all existing rules.

2

The State Admin will need to log into Ohio Buys and navigate to **Integration>Import Data**.



3

Under **Keywords**, search for the import titled "State of Ohio: Rules Engine Upload".

4

Next to the most recent import, select the pencil (✎) icon. The latest import will have the most recent time stamp as well as the highest numerical value in the **Import ID** column.

5

Under the **Files** section, select the hyperlink displaying the name of the excel spreadsheet to download the file and send to the Agency Admin to use as a template.

Ohio | Buys

How to Update the Rules Engine

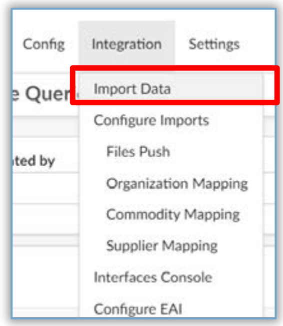
Step-by-Step Instructions for Creating New Rules

6 The Agency Admin should remove all existing data within the template sent to them by the State Admin prior to inputting the data for the new rule(s).

⚠ The existing data can be used as a reference for formatting new rules prior to deleting.

7 The Agency Admin should update the spreadsheet according to the definitions for each column on Page 3-4. After updating, the Agency Admin should send the file containing the new rules to the State Admin using the case management process.

8 After receiving the spreadsheet with the new rules, the State Admin should log into Ohio Buys. Navigate to **Integration>Import Data**.



9 Click **Create Import**.

10 Under the **Keywords** field, search for the import with code "oh_rules_engine_load_dep".

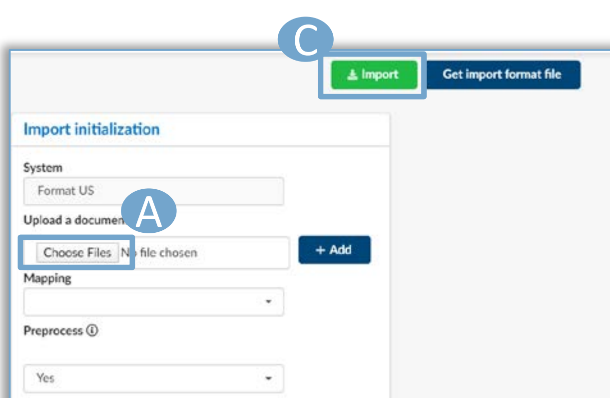
11 Click the edit ( ) icon next to the import name.

12 To upload the excel spreadsheet:

a) Click **Choose Files**

b) Select the document within the file sorter window

c) Click **Import**

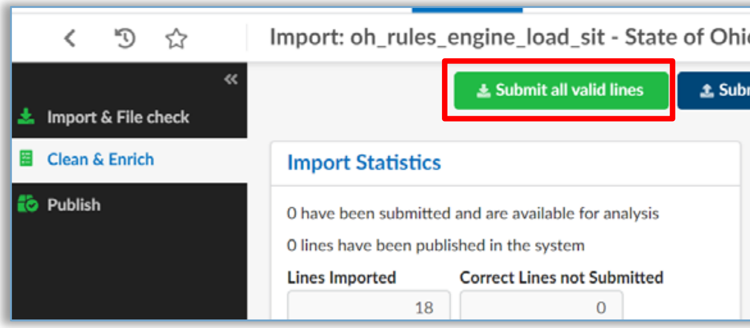


How to Update the Rules Engine

Step-by-Step Instructions for Updating/Deleting Existing Rules

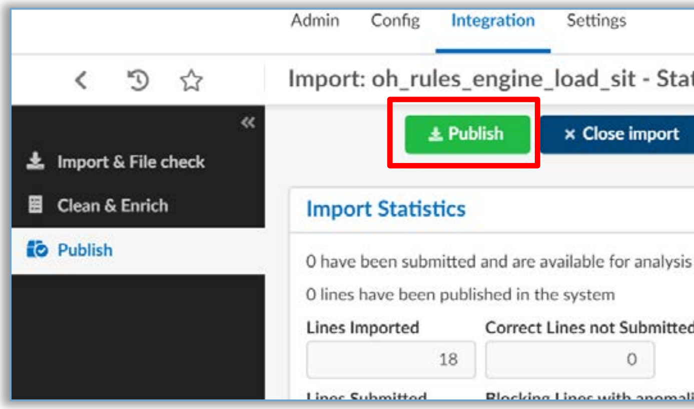
13

On the **Clean & Enrich** tab, click **Submit all valid lines**.



14

On the **Publish** tab, click **Publish**.



15

Select **x Close Import**.