

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 three 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.
 1. **If Less Than 20 Rules Need to be Updated:** These will be made through the Ohio|Buys UI, so export your agency's rules from the Manage Rules grid and use cell highlights and/or font color to indicate where changes exist. Submit this annotated grid as a CRM ticket.
 2. **If More Than 20 Rules Need to be Updated:** These will be made using an extract file provided by a State Admin after a CRM ticket detailing the requested updates has been submitted by the corresponding Agency Admin.
 3. **If a New Rule Needs to Be Added:** If new rules need to be added to existing rules, an ETL file will be provided to you by a State Admin after a CRM ticket is submitted. In the event both updates and new rules are needed, a State Admin will use discretion whether to enter these through the Ohio|Buys UI or use extract & ETL files depending on the number of rules involved.
- ▲ 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 will 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.

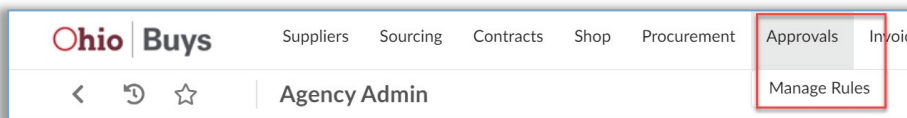
Step-by-Step Instructions for Updating/Deleting Less than 20 Existing Rules

1

To initiate change to less than 20 existing approval rules, the Agency Admin should export their agency's rules from the Manage Rules grid and use cell highlights and/or font color to indicate where changes exist. They should then submit this annotated grid as a CRM ticket by emailing ohiosharedservices@ohio.gov. A State Admin will be assigned to the case to make the updates directly in the Ohio|Buys UI.

2

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



3

Select the corresponding **Approval Type(s)** for your agency (e.g., DPS – Procurement, DPS – Fiscal, etc.) and then click **Search**.

A screenshot of the 'Ohio Requisition Workflow Rules' search interface. It features a 'Keywords' search bar, a 'Location' dropdown, and an 'Approval Type' dropdown. The 'Approval Type' dropdown is open, showing 'DPS - Fiscal' as the selected option. A red box highlights the 'Search' button and the 'Approval Type' dropdown. Below the search bar, there is a 'Filters' section showing 'Approval Type : DPS - Fiscal'.

4

Right-click on any of the column headers in the search results and then select **Download in Excel format**.

Download in Excel format



5

Open the corresponding Excel file and use cell highlights and/or font color to indicate where changes exist. For details regarding each column, please refer to pages 4 and 5 of this job aid. After the changes have been indicated, submit the annotated grid as a CRM ticket by emailing ohiosharedservices@ohio.gov.

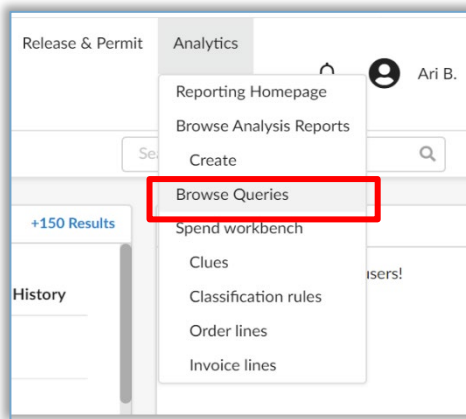
Step-by-Step Instructions for Updating/Deleting More than 20 Existing Rules

1

To initiate change to more than 20 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

Log in to Ohio|Buys and navigate to **Analytics>Browse Queries**.




3

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

Search

4

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

5

In the popup window, select the **Agency** and **PR Type** (e.g., Standard Purchase, Pcard Purchase, Blanket/Encumbrance Order, After the Fact Purchase, etc.).

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

6

Click the **Extract** button.

Extract

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 More than 20 Existing Rules

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) **Agency:** Lists the agency to which the rule belongs (e.g., DNR).
 - b) **Performer_Type:** Lists the approval category which corresponds to the performer at a workflow step for which a rule is being created (e.g. Procurement Approver, Fiscal Approver Final Approver).
 - c) **Rules_ID_Type:** Lists the approver type (e.g. Fiscal Approver, Final Approver). When a new rule is created in the system a Rule ID will be automatically assigned.
 - d) **Rules_Order:** Lists 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.
 - ▲ If only one rule is needed for an approval category or there is no need for approvers then enter 10 for the rule order.
 - e) **Orga:** Lists Orga Node (Agency, Division or Site). If this is a General Agency rule, put Agency Node. If not, enter the location (Division or Site in which this performer belongs to).
 - f) **Agency_Use:** Chart of Account Segment. This column is populated with a specific Agency Use value if your agency expects to drive approvals based on this segment.
 - g) **ALI:** Chart of Account Segment. This column is populated with a specific ALI value if your agency expects to drive approvals based on this segment.
 - h) **DEP:** Chart of Account Segment. This column is populated with a specific Department value if your agency expects to drive approvals based on this segment.
 - i) **Fund_From:** Chart of Account Segment. This column is populated with a specific Fund value if your agency expects to drive approvals based on this segment.
 - j) **Fund_To:** If you are going to use a fund rule, the **Fund_From** and **Fund_To** fields are populated. If the range is 1 then the starting and ending values should be the same since both fields are required.
 - k) **Operating_Unit:** Chart of Account Segment (i.e., ISTV_XREF). This column is populated with a specific Operating Unit value if your agency expects to drive approvals based on this segment.
 - l) **Program:** Chart of Account Segment. This column is populated with a specific Program value if your agency expects to drive approvals based on this segment.
 - m) **Project_Grant:** Chart of Account Segment. This column is populated with a specific Grant value if your agency expects to drive approvals based on this segment.

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8

- n) **Report:** Chart of Account Segment. This column is populated with a specific Report value if your agency expects to drive approvals based on this segment.
- o) **Service_Location:** Chart of Account Segment. This column is populated with a specific Service Location value if your agency expects to drive approvals based on this segment.
- p) **Account_From:** Chart of Account Segment. This column is populated with a specific Account Code value if your agency expects to drive approvals based on this segment.
- q) **Account_To:** If you are going to use an account rule, the **Account_From** and the **Account_To** fields are populated.
- r) **Budget_Reference:** Chart of Account Segment. This column is populated with a specific Budget Reference value if your agency expects to drive approvals based on this segment.
- s) **UNSPSC:** This column is populated with a specific Commodity number value (e.g., 43000000) if your agency expects to drive approvals based on this field. Be careful to select the appropriate commodity code level in which the rule should be applied meaning if enter Level 1 IT code 43000000 then the rule will cover all items with commodity codes that are children of the Level 1 code (e.g., all Level 2, Level 3, and Level 4 codes).
- t) **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, separate lines are entered.
- u) **Threshold_Lower:** If an agency does not have a need for threshold amount (dollar value), then 0 to 999,999,999,999 is entered.
- v) **Threshold_Upper:** If an agency does not have a need for threshold amount (dollar value), then 0 to 999,999,999,999 is entered.
- w) **Login_User_X:** Actual user's eProcurement OHID the requisition will be routed to as an approver when this rule is met. (e.g., 10120210)
- x) **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, this column is marked as 'yes'.
- y) **Comments:** Provides comments that reviewers of this document need to know.
- z) **Dept Codes:** Lists Orga Node that IS NOT an Agency, Division, or Site. Contains the HCM reporting level department code which is a level that falls below the Division level in the HCM organization hierarchy but has multiple Site Locations that roll up to it. This is due to the Ohio|Buys Organization Hierarchy having 3 levels (Agency, Division, Site Location) and HCM Organization Hierarchy for some agencies can be as many as 7 levels (Agency, Division, Dept 3-7). A Site Location in Ohio|Buys is created by joining the HCM Dept 3-7 code with the Employee HCM Location Code (e.g. DPS290659 HPP59)

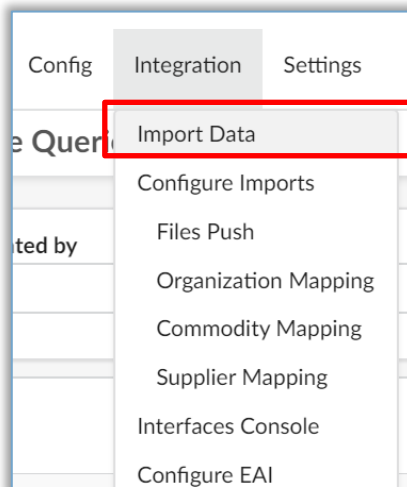
9

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

Step-by-Step Instructions for Updating/Deleting More than 20 Existing Rules

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

10



11

Click **Create Import**.

12

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

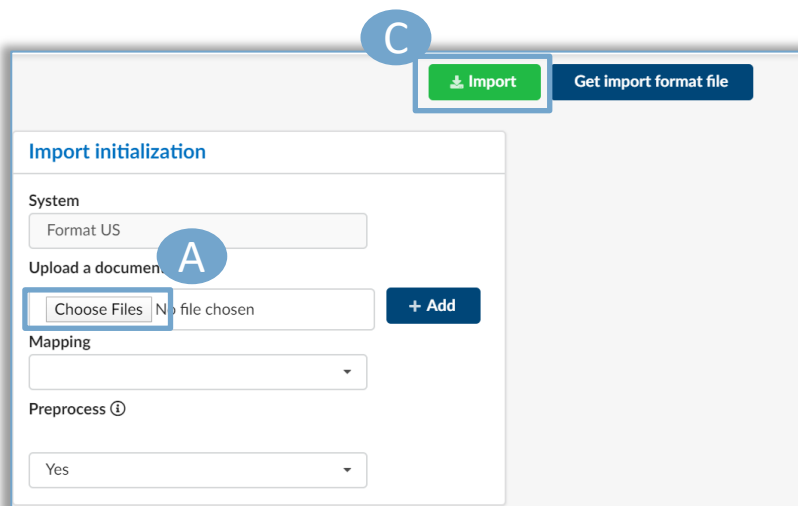
13

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

14

To upload the excel spreadsheet:

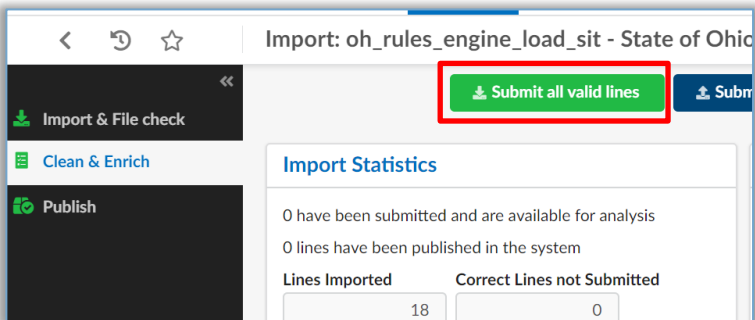
- Click **Choose Files**
- Select the document within the file sorter window
- Click **Import**



Step-by-Step Instructions for Updating/Deleting More than 20 Existing Rules

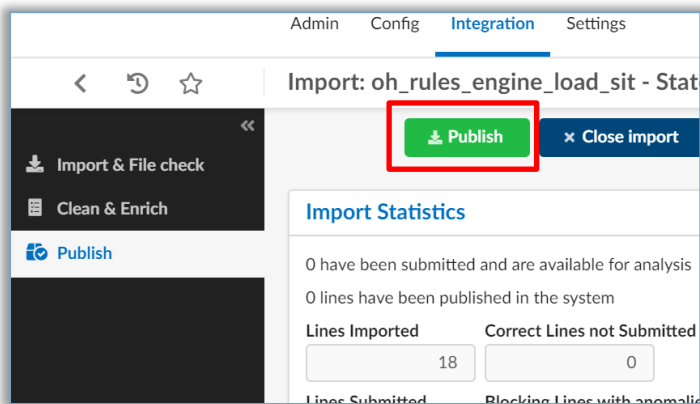
On the **Clean & Enrich** tab, click **Submit all valid lines**.

15



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

16



Select **x Close Import**.

17

A blue button with a white 'x' icon and the text 'Close import'.

Step-by-Step Instructions for Creating New Rules

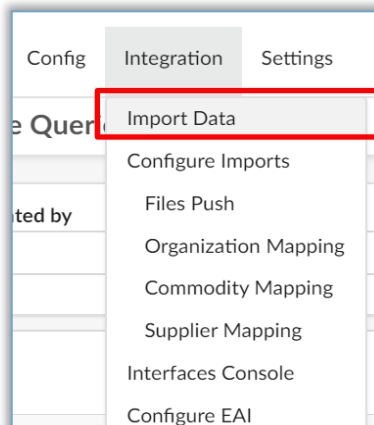
1

To initiate a request to add new rules, the Agency Admin should email ohiosharedservices@ohio.gov indicating that new rules need to be added. 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 in to Ohio Buys and navigate to **Integration>Import Data**.



3

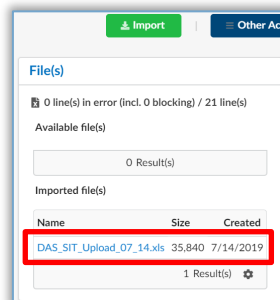
Under **Keywords**, search for the import titled “State of Ohio: Rules Engine Upload Version 2”.

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.



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).

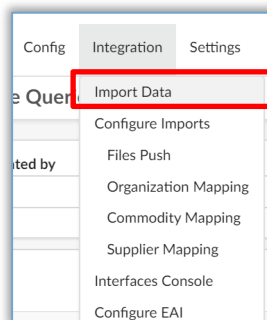
▲ The existing data can be used as a reference for formatting new rules prior to deleting.

7

The Agency Admin should update the spreadsheet according to the definitions for each column on pages 4 and 5. 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".

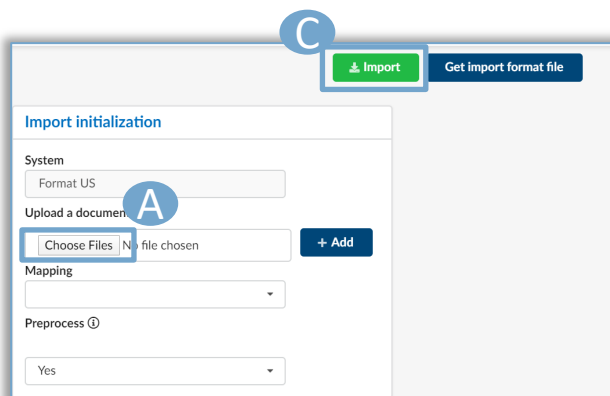
11

Click the edit (+📄) icon next to the import name.

12

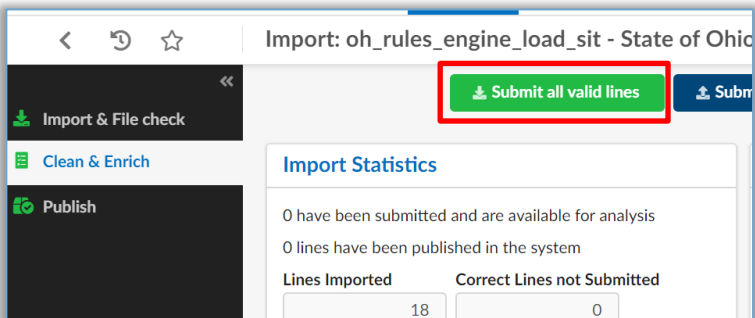
To upload the excel spreadsheet:

- Click **Choose Files**.
- Select the document within the file sorter window.
- Click **Import**.

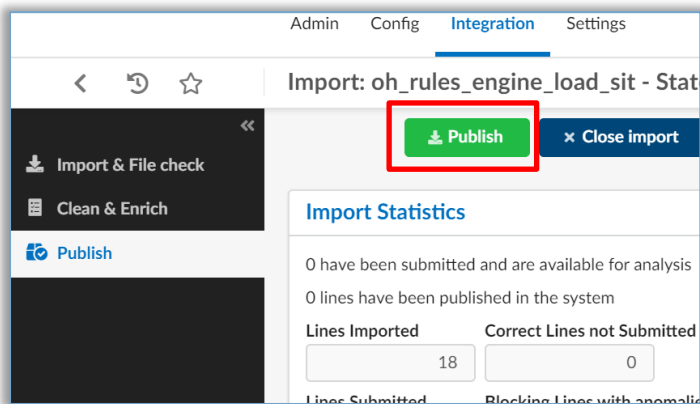


Step-by-Step Instructions for Updating/Deleting Existing Rules

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



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



Select **x Close Import**.

