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.

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 (columns T-AD).

When populating the template, selecting the title of each column will provide instructions on what is expected for the cells within that column.

A few things to note when updating the rules engine:

- The existing rules should be reviewed prior to any updates. The existing rules can be extracted by logging into Ohio Buys, navigating to Approvals>Manage Rules, right-clicking on the grid, and selecting Download in Excel format. Your access to this page is contingent upon the profiles assigned to you.
- 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 (column C) 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 setting up the Safety Net approval rule, only the fields that are listed on page 2 and page 3 should be completed. This ensures that the rule is general enough to apply to all scenarios.
- For all categories, the information in the rules engine spreadsheet will populate the different fields within Ohio Buys (see page 2 and page 3).

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 Spreadsheet

Step-by-Step Instructions for Updating the Rules Engine Spreadsheet

A
Agency (e.g. DAS, DOT) + Performer_Type (e.g. fiscal, final)

These columns will populate Approval Type field and dictate the type of rule that is being created.

B
Req_Type (e.g. Standard Purchase, After the Fact Purchase)

This populates the PR Types field and dictates the purchase requisition types that will apply this rule during the execution of the PR workflow.

C
Orga (e.g. INS, DYS)

This populates the Main Organization field and dictates the organization that the rule applies to.

\[ \text{This should be equal to an Agency, Division, or Site only.} \]

D
Rule_Order

This column populates the Order field and dictates the order in which the rule is executed during the approval workflow step. The lower the number the higher priority the rule.

\[ \text{This column can be used to set up sequential approvals that have the same parameters (e.g. a Final approval for an agency that should be routed to multiple people)} \]

\[ \text{For rules requisitions that should be routed to different users based on the HCM organizational hierarchy, leverage the Department columns} \]
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

How to Update the Rules Engine Spreadsheet

**Threshold_Lower**
This populates the lower dollar amount threshold that will trigger the execution of this rule.

**Threshold_Upper**
This populates the upper dollar amount threshold that will trigger the execution of this rule.

**Login_User_#**
These columns indicate which users should be pulled in to approve. There should be one user per column and the value must be equal to the user’s State of Ohio User ID.

▲ The remaining columns within the spreadsheet are optional.
▲ The Status field does not correspond with a column on the spreadsheet, but will automatically populate with a value of “valid”

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).