

Job Aid: How to Create a Multi-Organizational Approval Path

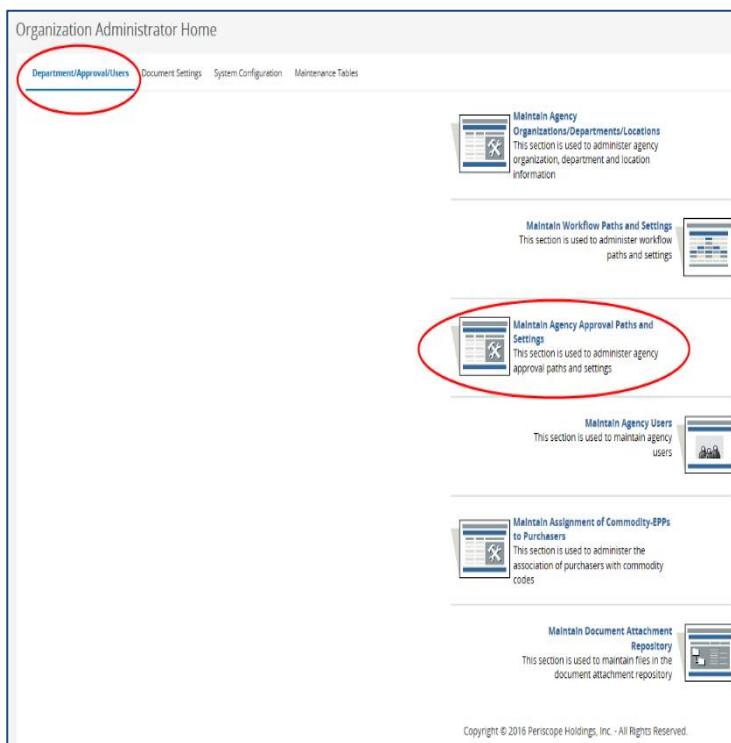
This Job Aid shows how to:

- Create, manage, and adjust approval paths to add a multi-organization (multi-org) approver

Of Special Note:

Setting up a multi-org approval path requires the participation of Organization Administrators (OAs) from each participating organization. **It is critical to ensure legal foundation for adding other agency users. The organizations involved must have a valid Interagency Service Agreement (ISA) or some type of legal authority.** The OA from one organization gives access to a user to be an approver on another organization's approval path and creates a multi-org approval path. Thought and structure must be developed or known to ensure that approval paths are created properly, therefore we recommend only after discussion with the Agency Chief Procurement Officer, Chief Fiscal Officer and COMMBUYS liaisons should Approval Paths be entered into the system by the Organization Administrator (OA). The OA has the ability to add, edit, and remove all organization approval paths.

Screenshot



Directions

Step 1: Selecting the Maintain Agency Approval Paths and Settings Icon

After logging in, the home page opens on the Department/Approval/Users tab.

Select **Maintain Agency Approval Paths and Settings**.

We are going to ensure that we have an Approval Type and then create a new Approval Path.

Approval Path Maintenance for: Operational Services Division

Path ID	Name	Organization	Approval Type	Dollar Range From	Dollar Range To	Status	Priority
04001	CRM-OK Approval 1	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$0.999.999.999.99 (Default)	Inactive	10
04002	CRM-OK Approval 2	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$0.999.999.999.99 Active	10	
05000	Test - IL	1000 - Operational Services Division	00220 - Finance Approval	\$0.00	\$500.00 Inactive	20	
05004	000 UPC	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05005	000 UPC 200	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05006	000 COMBILUS	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Inactive	10	
05007	000 TRAINING	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Inactive	10	
05008	000 CG	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05009	000 DM	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05010	000 HRA	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05011	000 MZ	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05012	000 EIE	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05013	000 OS	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05014	000 LSE	1000 - Operational Services Division	00210 - Departmental Approval	\$0.00	\$999.999.999.999.99 Active	10	
05020	Finance approval	1000 - Operational Services Division	00220 - Finance approval	\$0.00	\$999.999.999.999.99 Active	20	
05030	Sourcing Team Approval	1000 - Operational Services Division	00230 - Sourcing Team Approval	\$0.00	\$0.999.999.999.999.99 Inactive	30	
05032	Sourcing Team Approval	1000 - Operational Services Division	00230 - Sourcing Team Approval	\$0.00	\$0.999.999.999.999.99 Active	30	
05033	Sourcing Team Approval	1000 - Operational Services Division	00230 - Sourcing Team Approval	\$0.00	\$0.999.999.999.999.99 Inactive	30	
8800	Test Admin	1000 - Operational Services Division	8800 - Test Admin	\$0.00	\$99.999.999.99 Active	5	

[Add New Approval Path](#) [Configure Approval Settings](#) [Global Approver Replace](#) [Exit](#)

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Step 2: Configuring the Approval Settings

The **Approval Path Maintenance** page displays.

1. Click on the **Configure Approval Settings** button at the bottom of the page. At least one Approval Type must be activated in order to create Approval Paths.

Step 3: Maintaining Approval Settings and Types

This displays the **Approval Settings & Types** your organization currently can utilize.

Agency Approval Paths, when applied to a document are controlled by the Approval Settings and Types.

The page consists of two sections:

- 1) Maintain Organization Approval Setting
- 2) Maintain Organization Approval Types

Maintain Organization Approval Setting

Cascade Settings:

No Cascading – You will be able to select from only one specified approval path.

Non-Auto Cascading – You will be able to select from any and all specified approval paths.

Auto Cascading – You will see the paths that have been selected automatically but cannot change them. (this option is the default and recommended)

Maintain Organization Approval Types

Approval Types are categories to support approval paths. They are not approval paths themselves.

If you want to modify an existing approval type, you can make edits to the Description, Priority, and Status (unless an active Approval Path is connected to this Approval Type.)

To enter a new approval type, enter a 5-digit alpha numeric unique identifier for the **Approval Type ID**.

- For large organizations with many types of approvals, you may choose to use this identifier to represent a chronological path represented by using the three-letter department (HR123) or (IT001). Name this path with a general **Description** of its purpose. It could be related to the individual type of purchase, or the level of authority needed to approve it. (e.g. IT approvals)

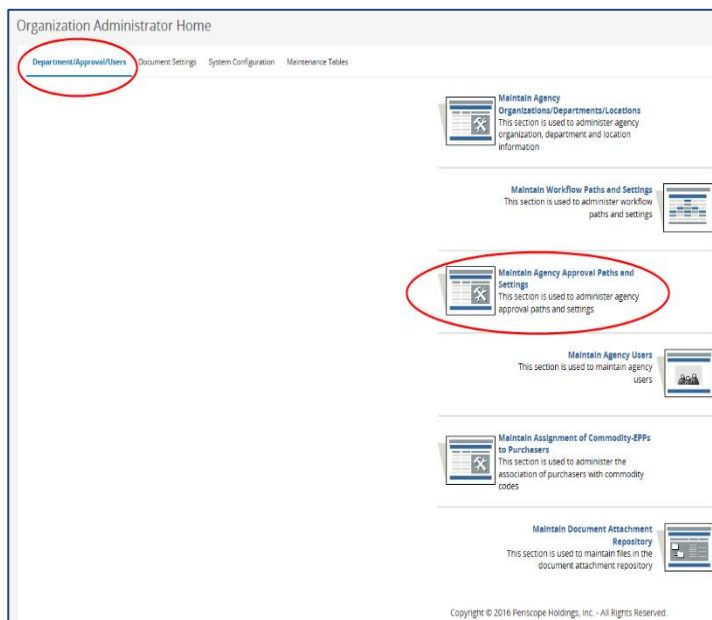
Assign this path a **Priority** from 1 to 99.

- 1 is low priority and 99 the highest
- The system will prioritize the sequence in which Approval Paths are triggered based on this Priority

level, if the Approval Path conditions meet those present on the document to be approved

This path will be active by default unless you inactivate it if it is no longer in use.

Click on the **Save & Continue** button to save current path and add another or **Save & Exit**.



Step 4: Maintaining Agency Approval Paths

1. Click on the **Maintain Agency Approval Paths and Settings** icon from the OA Homepage.

Approval Path Maintenance for: Operational Services Division

Path ID	Name	Organization	Approval Type	Dollar Range From	Dollar Range To	Status	Priority
QAD01	QDA-CA-Approval-1	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$0.000,000.000.000.00	Deleted	10
QAD02	QDA-CA-Approval-2	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$0.000,000.000.000.00	Active	10
QSD-00	Test - SL	1000 - Operational Services Division	QSD-00 - Finance Approval	\$0.00	\$0.000.000.000.00	Inactive	20
QSD04	QSD-LPC	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD06	QSD-LPC-000	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD08	QSD-COMMBUYS	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Inactive	10
QSD07	QSD-TANAKANG	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Inactive	10
QSD09	QSD-CIS	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD08A	QSD-CIS	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD10	QSD-494	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD11	QSD-412	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD12	QSD-416	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD13	QSD-CIS	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD14	QSD-CIS	1000 - Operational Services Division	QSD-10 - Departmental Approval	\$0.00	\$000,000.000.000.00	Active	10
QSD20	Finance Approval	1000 - Operational Services Division	QSD-00 - Finance Approval	\$0.00	\$000,000.000.000.00	Active	20
QSD30	Sourcing Team Approval	1000 - Operational Services Division	QSD-00 - Sourcing Team Approval	\$0.00	\$0.000.000.000.000.00	Inactive	30
QSD31	Sourcing Team Approval	1000 - Operational Services Division	QSD-00 - Sourcing Team Approval	\$0.00	\$0.000.000.000.000.00	Active	30
QSD33	Sourcing Team Approval	1000 - Operational Services Division	QSD-00 - Sourcing Team Approval	\$0.00	\$0.000.000.000.000.00	Inactive	30
880	Test Server	1000 - Operational Services Division	880 - Test Server	\$0.00	\$00.000.000.000.00	Active	1

[Add New Approval Path](#)
[Configure Approval Settings](#)
[Global Approver Replace](#)
[Exit](#)

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Step 5: Adding New Approval Paths

When you click on the icon, you will see all the approval paths you currently have, both active and inactive.

1. A Search box will appear if you have more than 25 approval paths to help locate paths in your organization. You may use any or all of the search criteria to find the approval path you would like to modify.

To edit an existing approval path, click on the blue hyperlink in the **Path ID** column or click the **Add New Approval Path** button at the bottom of the page to build a new path.

NOTE:

2. **Global Approver Replace** - The Global Approver Replace function will replace the current approver with a new Approver on all Approval Paths where this user is named. Use the magnifying glass lookup icon to open the lookup search to find the appropriate user to select as the Global Approver. This would be used if an employee changed roles or is no longer using COMMBUYS.

Step 6: Entering Approval Path Information

After clicking on the **Add New Approval Path** button, the screen displays the General tab on the New Approval Path page. Enter the required information and move through the tabs from left to right. On each tab page, fill out the asterisked fields, click on the **Save** and **Continue** button, then go to the next tab.

General Tab:

- **Approval Path ID** – a unique 5-digit alpha numeric ID related to the use of the path. For example, if it is a path for a specific department, you may choose to utilize the first three characters of the department followed by a path #
- **Description or Approval Path Name** – the path name reflects what kind of path this is. For example, IT Approvals
- **Approval Type** – choose from the dropdown menu of your previously-entered Approval Types
- **Dollar Range** – required; to enable for all dollar amounts, set the dollar range from 0.00 to 9,999,999,999,999.99 (the maximum amount allowed)
- **Status** – Active/Inactive
- **Roles** – designate this path to be used if a Basic Purchasing user and or Department Access user. **NOTE:** Inventory and Accounts Payable is not available
- **Approval Doc/Doc Sub Types** – select all the types of documents that will apply to this path

If no document types are selected, the approval path will apply to all document types, as long as the other criteria of the path are met

- **Level** - Level 1 is the first approver, and if additional levels are needed, Level 2 would be the second approver, and so on.
- **Approver** - Use the magnifying glass icon to search for the desired approvers (Step 7 below). This will be the Primary Approver.
- **Alternate** - An alternate approver, if chosen, will make the document available to all approvers, so the Primary or Alternate Approver can approve for the document to move forward.

Click on the **Save & Continue** button.

Screenshot

User Lookup for: Attorney General's Office

Search Using: ALL of the criteria

Search Fields: First Name: Renee Last Name: O'Rourke

Login ID:

Organization: Operational Services Division

Department:

Location:

User Role: Basic Purchasing
Department Access
Inventory User
Accounts Payable

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It Clear

Close Window

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Directions

Step 7: Searching for Users

After clicking on the magnifying glass icon to search for the desired approver, a **User Lookup** window opens. To search for the user by Organization, use the Organization dropdown to find the multi-org approver. You can use any of the other search fields instead if that is easier.

Click on the **Find It** button.

Remember:

- An ISA or other legal authority is required in order to select the appropriate user
- Just because some users are an option, does not mean you have permission to designate them as an approver

Search Fields: First Name: Renee Last Name: O'Rourke

Login ID:

Organization: Operational Services Division

Department:

Location:

User Role: Basic Purchasing
Department Access
Inventory User
Accounts Payable

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It Clear

Select

Select	Login ID	First Name	Last Name	Status	Roles
<input checked="" type="radio"/>	ROKOURKE	Renee	O'Rourke	Active	Basic Purchasing Organization Administrator Form Builder Administrator Grant Multorg Approval Rights

Select Close Window

Step 8: Selecting Eligible Users

Select the eligible user for this approval path by clicking on the **Select** radio button.

Click on the **Select** button at the bottom of the page.

NOTE: A user from another organization only appears once they have been granted multi-org approval rights. This is covered in the Job Aid *How to Create a Multi-Organization Approver User*.

Approvers

Delete	Link	Approver	Alternate
		O'Rourke, Renee	

Step 9: Selecting Approvers

The selected user appears as an approver.

If you need to designate an additional approver, select from the dropdown to find an approver within your organization, or use the magnifying glass icon again to find a user from another organization.

Be sure to click on the **Save & Continue** button after completing the General tab.

Screenshot



Directions

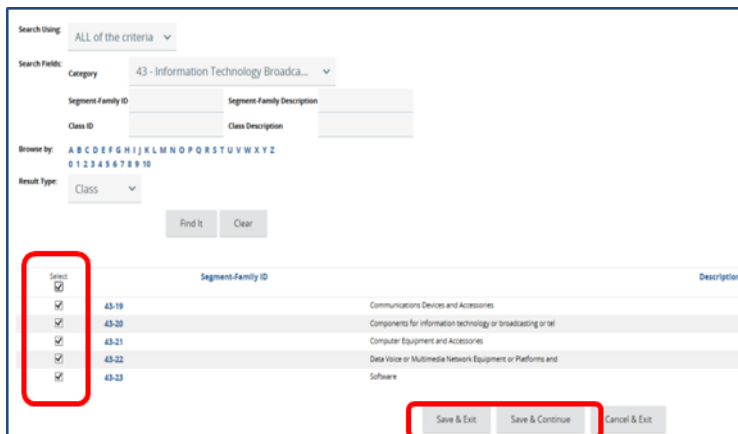
Step 10: Adding UNSPSC Codes

Click on the **UNSPSC Code** tab.

Click on the **Add UNSPSC Segment-Family/Class** button to add commodity codes to this approval path.

A new window opens showing a search box, which we will see on the next slide. In this example we will search for IT-related UNSPSC codes, to which we will assign to this approval path.

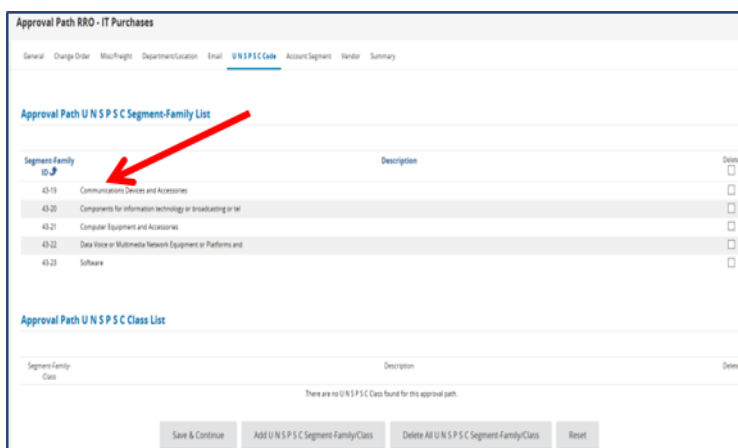
NOTE: A path that has this feature enabled applies to all departments in the organization. That is, if you create an approval path based on a Department/Location, you should not add a UNSPSC Code to that path.



Step 11: Selecting UNSPSC Codes

Click on the **Select** checkbox adjacent to the correct corresponding UNSPSC codes. Note how the top Select button, will select all.

Click the **Save & Continue** button to perform another search and add further codes or click the **Save & Exit** button to return to the saved view of UNSPSC codes for this approval path.



Step 12: Reviewing the Codes

All the appropriate codes are saved on the **UNSPSC Code** tab. You can add or delete codes at any time.

For example, if a purchasing user in your agency finds that a commodity or service that requires approval through this path is being missed, the OA can return to this path and add additional UNSPSC codes.