

Job Aid:

How to Create a Multi-organization Approval Path

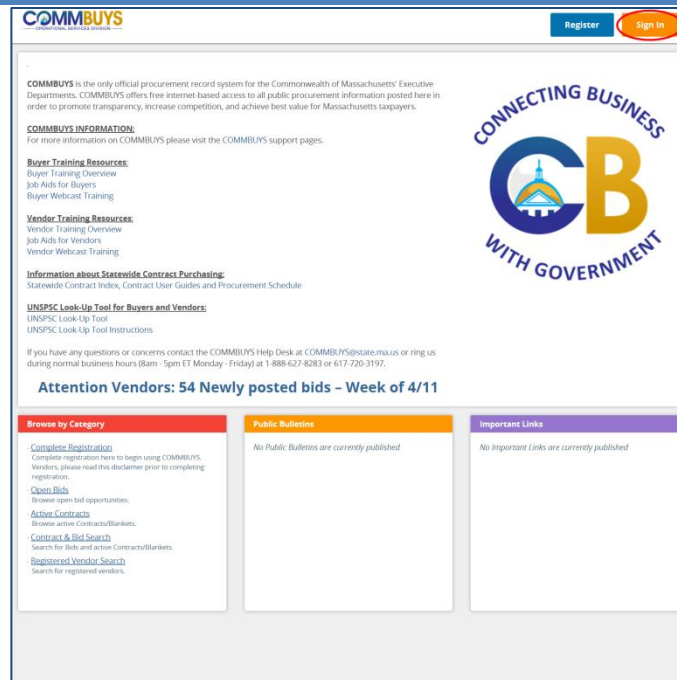
This Job Aid shows how to:

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

Overview and Requirements:

Setting up a multiorg 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 multiorg 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

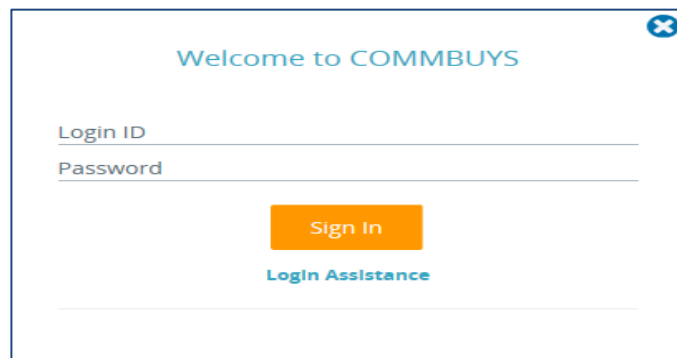


Directions

Step 1: Signing in to COMMBUYS

Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](#).

1. Click on the orange **Sign In** button in the upper right hand corner.
2. Enter your Login ID and Password and click on the **Sign In** button.

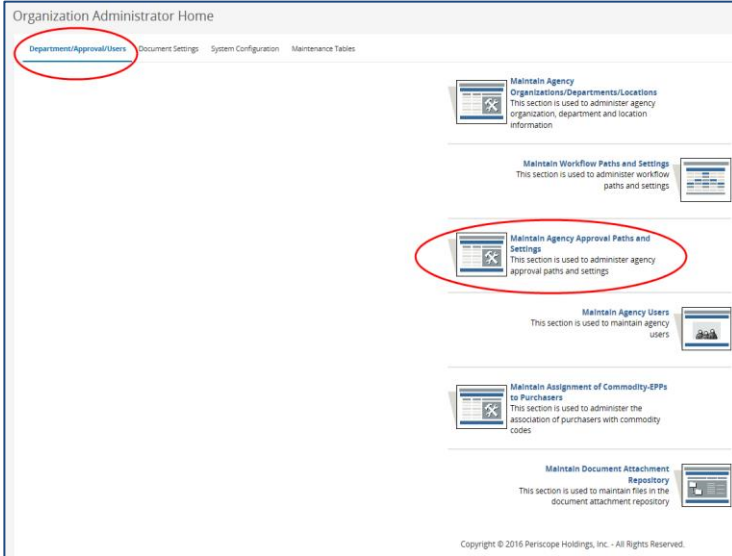


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Step 2: Selecting the Maintain Agency Approval Paths and Settings Icon

This is the OA Home page. 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
0001	COMA-04-Approval-1	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$1,000,000,000.00	Deactivated	10
0002	COMA-04-Approval-2	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$1,000,000,000.00	Active	10
00030	Test - 30	1000 - Operational Services Division	00220 - Functional Approval	\$1.00	\$100.00	Active	20
00040	002 - JC	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00050	002 - JC - 020	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00056	002 - COMB/MS	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00057	002 - TRAVEL	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00058	002 - IS	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00060A	002 - OAV	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00070	002 - WVA	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00071	002 - R3	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00072	002 - R2	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00073	002 - OVS	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00074	002 - L2	1000 - Operational Services Division	00210 - Departmental Approval	\$1.00	\$999,999,999.99	Active	10
00080	Functional Approval	1000 - Operational Services Division	00220 - Functional Approval	\$1.00	\$100,000,000.00	Active	20
00090	Sourcing Team Approvals	1000 - Operational Services Division	00250 - Sourcing Team Approvals	\$1.00	\$1,000,000,000.00	Inactive	30
00081	Sourcing Team Approvals	1000 - Operational Services Division	00250 - Sourcing Team Approvals	\$1.00	\$1,000,000,000.00	Active	30
00091	Sourcing Team Approvals	1000 - Operational Services Division	00250 - Sourcing Team Approvals	\$1.00	\$1,000,000,000.00	Inactive	30
800	Test Name	1000 - Operational Services Division	800 - Test Name	\$1.00	\$99,999,999.99	Active	1

Buttons: Add New Approval Path, Configure Approval Settings, Global Approvals Replace, Exit

Step 3: Configuring the Approval Settings

The Approval Path Maintenance page displays.

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.

Maintain Organization Approval Setting for: Operational Services Division

Organization: 1000 - Operational Services Division

Cascade Setting: Auto Cascading

Maintain Organization Approval Types for: Operational Services Division

Organization: 1000 - Operational Services Division

Approval Type ID	Description	Priority	Status	Details
800	Test Name	1	Active	View Related
0001	COMA-04-Approval-1	1	Inactive	View Related
0002	COMA-04-Approval-2	10	Active	View Related
00030	Test - 30	20	Active	View Related
00040	002 - JC	10	Active	View Related
00050	002 - JC - 020	10	Active	View Related
00056	002 - COMB/MS	10	Active	View Related
00057	002 - TRAVEL	10	Active	View Related
00058	002 - IS	10	Active	View Related
00060A	002 - OAV	10	Active	View Related
00070	002 - WVA	10	Active	View Related
00071	002 - R3	10	Active	View Related
00072	002 - R2	10	Active	View Related
00073	002 - OVS	10	Active	View Related
00074	002 - L2	10	Active	View Related
00080	Functional Approval	20	Active	View Related
00090	Sourcing Team Approvals	30	Active	View Related
00081	Sourcing Team Approvals	30	Active	View Related
00091	Sourcing Team Approvals	30	Inactive	View Related

Buttons: Save & Exit, Save & Continue, Reset, Cancel & Exit

Step 4: 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

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Maintain Organization Approval Setting for: Operational Services Division

Organization	
Cascade Setting	<input type="radio"/> No Cascading <input checked="" type="radio"/> Auto Cascading <input type="radio"/> Non-Auto Cascading

Maintain Organization Approval Types for: Operational Services Division

Organization: 1080 - Operational Services Division

Approval Type ID	Description	Priority	Status	More
1080			Active	

Directions

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**.

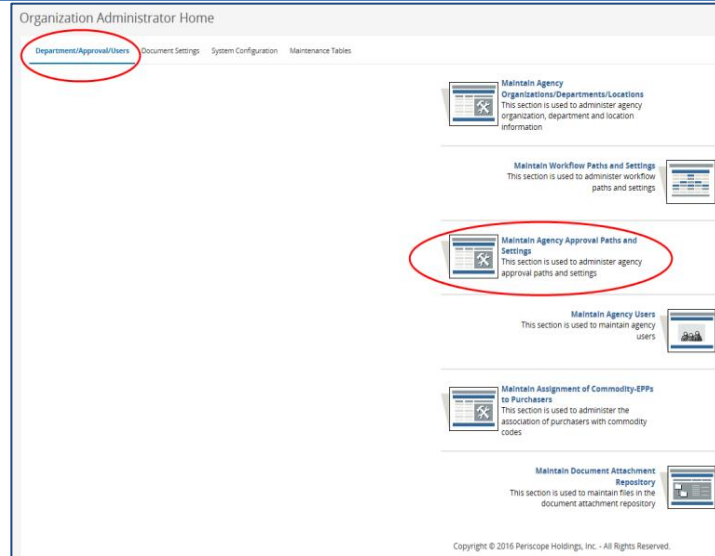


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Step 5: Maintaining Agency Approval Paths

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
04001	COMA-0A-Approvals1	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$0,000,000,000.00	Inactive	10
04002	COMA-0A-Approvals2	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$0,000,000,000.00	Active	10
05000	Test - SL	1000 - Operational Services Division	02010 - Financial Approval	\$0.00	\$00.00	Inactive	20
00004	02010C	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00005	02010C020	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00006	020COMMBUYS	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Inactive	10
00007	020TRAINING	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Inactive	10
00008	020ISS	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00009A	020DVA	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00010	020HRA	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00011	020M2	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00012	020E4E	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00013	020DPS	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00014	020LDR	1000 - Operational Services Division	02010 - Departmental Approval	\$0.00	\$999,999,999.00	Active	10
00015	Finance Approval	1000 - Operational Services Division	02010 - Financial Approval	\$0.00	\$999,999,999.00	Active	20
00016	Sourcing Team Approval	1000 - Operational Services Division	02010 - Sourcing Team Approval	\$0.00	\$999,999,999.00	Inactive	20
00017	Sourcing Team Approval	1000 - Operational Services Division	02010 - Sourcing Team Approval	\$0.00	\$999,999,999.00	Active	20
00018	Sourcing Team Approval	1000 - Operational Services Division	02010 - Sourcing Team Approval	\$0.00	\$999,999,999.00	Inactive	20
999	Test Server	1000 - Operational Services Division	999 - Test Server	\$0.00	\$999,999.00	Active	1

Buttons: Add New Approval Path, Configure Approval Settings, Global Approver Replace, Exit

Step 6: Adding New Approval Paths

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

- 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.

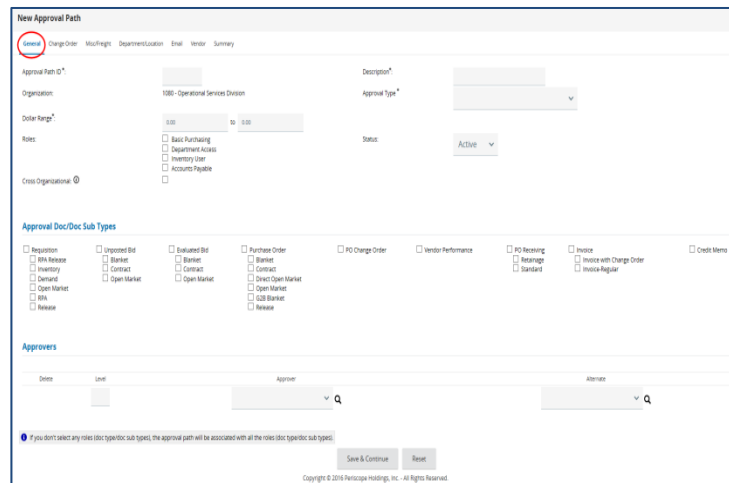
NOTE:

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.

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New Approval Path

Approval Path ID* [] Description* []

Organization: 1000 - Operational Services Division Approval Type* []

Dollar Range*: 0.00 to 0.00

Roles:

- Basic Purchasing
- Department Access
- Inventory User
- Accounts Payable

Status: Active

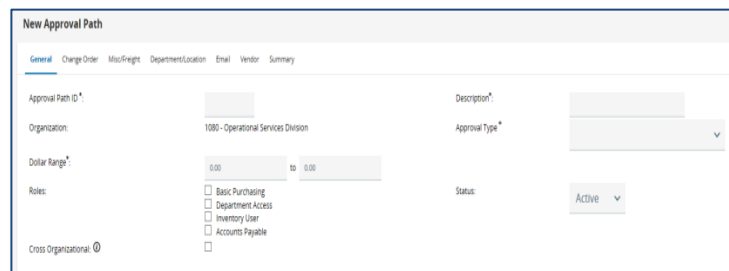
Approval Doc/Doc Sub Types:

- Requestion
- RFA Release
- Inventory
- Demand
- Open Market
- RFA
- Release
- Unopened Bid
- Blanket
- Contract
- Open Market
- Evaluated Bid
- Blanket
- Contract
- Open Market
- Purchase Order
- Blanket
- Contract
- Direct Open Market
- Open Market
- COB Blanket
- Release
- PO Change Order
- Vendor Performance
- PO Receiving
- Reimburse
- Standard
- Invoice
- Invoice with Change Order
- Invoice-Regular
- Credit Memo

Approvers:

Date*	Level	Approver	Alternate
[]	[]	[]	[]

Save & Continue | Reset



New Approval Path

Approval Path ID* [] Description* []

Organization: 1000 - Operational Services Division Approval Type* []

Dollar Range*: 0.00 to 0.00

Roles:

- Basic Purchasing
- Department Access
- Inventory User
- Accounts Payable

Status: Active

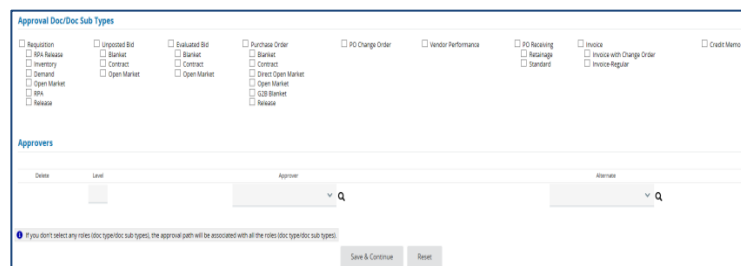
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Approvers:

Date*	Level	Approver	Alternate
[]	[]	[]	[]

Save & Continue | Reset



Approval Doc/Doc Sub Types

Approval Doc/Doc Sub Types:

- Requestion
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- Reimburse
- Standard
- Invoice
- Invoice with Change Order
- Invoice-Regular
- Credit Memo

Approvers:

Date*	Level	Approver	Alternate
[]	[]	[]	[]

Save & Continue | Reset

Directions

Step 7: 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 move 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 pull down 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 of 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
- **Select Approvers** - Use the magnifying glass icon to search for the desired approvers (more detail in next steps 8-10)
- **Level** - Level 1 is the first approver, and if additional levels are needed, Level 2 would be the second approver, and so on
- **Type** - A Primary approver means a required approver. An alternate approver, if chosen, will make the

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document available to both approvers so either one can approve for the document to move forward.

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

User Lookup for: Attorney General's Office

Search Using: ALL of the criteria

Search Fields: First Name: Renee Last Name: orourke

Login ID: [Empty]

Organization: Operational Services Division

Department: [Empty]

Location: [Empty]

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

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Step 8: 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 multiorg approver. You can use any of the other search fields instead if that is easier.

Click 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: orourke

Login ID: [Empty]

Organization: Operational Services Division

Department: [Empty]

Location: [Empty]

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

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

Step 9: 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 multiorg approval rights.

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Date	Level	Approver	Alternate
		O'Rourke, Renee	

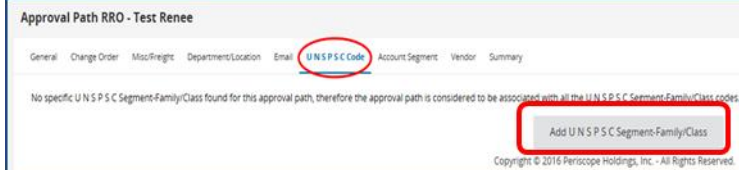
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Step 10: Selecting Approvers

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.



Approval Path RRO - Test Renee

General Change Order Misc/Freight Departments/Location Email **UNSPSC Code** Account Segment Vendor Summary

No specific UNSPSC Segment-Family/Class found for this approval path, therefore the approval path is considered to be associated with all the UNSPSC Segment-Family/Class codes.

Add UNSPSC Segment-Family/Class

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Step 11: 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.

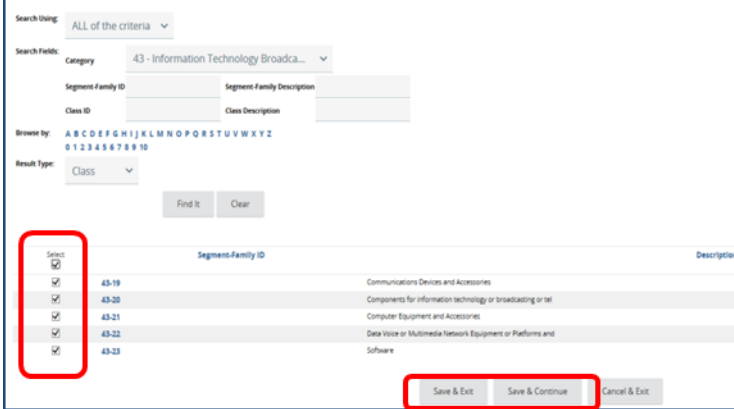
A new window opens showing a search box, which we will see on the next slide. In this example we will search for IT-related UNSPSC codes, to which we will assign to this approval path.

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.

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Search Using: ALL of the criteria

Search Fields: Category: 43 - Information Technology Broadca...

Segment Family ID: [] Segment Family Description: []

Class ID: [] Class Description: []

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

Result Type: Class

Find It Clear

Select	Segment Family ID	Description
<input checked="" type="checkbox"/>	43-19	Communications Devices and Accessories
<input checked="" type="checkbox"/>	43-20	Components for information technology or broadcasting or tel
<input checked="" type="checkbox"/>	43-21	Computer Equipment and Accessories
<input checked="" type="checkbox"/>	43-22	Data Voice or Multimedia Network Equipment or Platforms and
<input checked="" type="checkbox"/>	43-23	Software

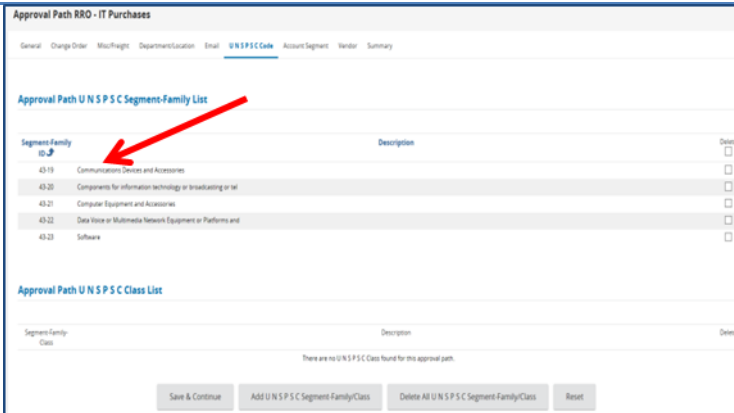
Save & Exit Save & Continue Cancel & Exit

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Step 12: 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.



Approval Path RRO - IT Purchases

General Change Order Misc/Frght Department/Location Email **UNSPSC Code** Account Segment Vendor Summary

Approval Path UNSPSC Segment-Family List

Segment Family ID	Description	Delete
43-19	Communications Devices and Accessories	<input type="checkbox"/>
43-20	Components for information technology or broadcasting or tel	<input type="checkbox"/>
43-21	Computer Equipment and Accessories	<input type="checkbox"/>
43-22	Data Voice or Multimedia Network Equipment or Platforms and	<input type="checkbox"/>
43-23	Software	<input type="checkbox"/>

Approval Path UNSPSC Class List

Segment Family: [] Description: [] Delete: []

Class: []

There are no UNSPSC Class found for the approval path.

Save & Continue Add UNSPSC Segment Family/Class Delete All UNSPSC Segment Family/Class Reset

Step 13: 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.

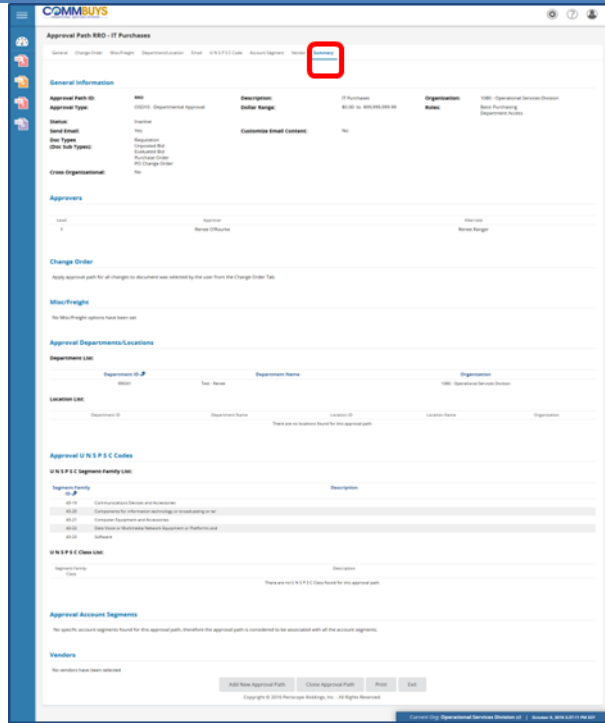


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Step 14: Reviewing the Summary Tab

The **Summary tab** allows you to view all the information entered for this path.

The path does not require submission, and is active, unless otherwise changed.

If you need to create another very similar approval path, you can use the **Clone Approval Path** button on the bottom of the page to create and edit a copy of the approval path you are currently viewing. All original information will populate in the new path. Navigate through the tabs (shown above) to customize the path.