

Job Aid: How to Create a Multi-Organization Approver User

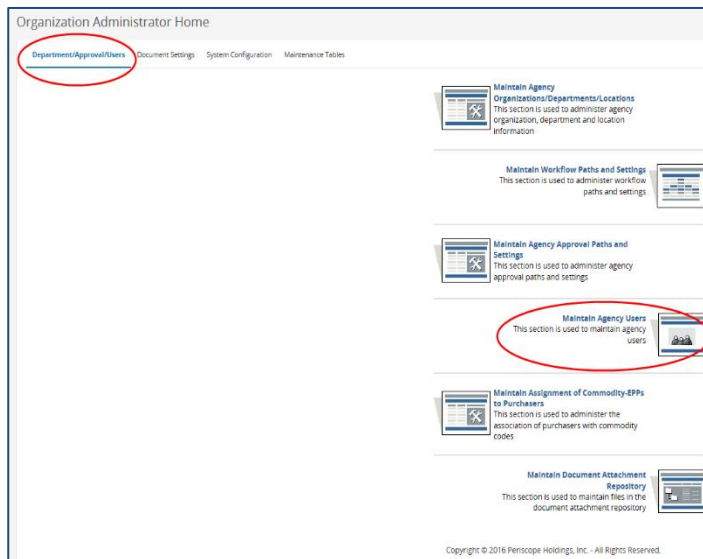
This Job Aid shows how to:

- Create a multi-organization (multi-org) approver user.

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.

Screenshot



Directions

Step 1: Clicking on the Maintain Agency Users Icon

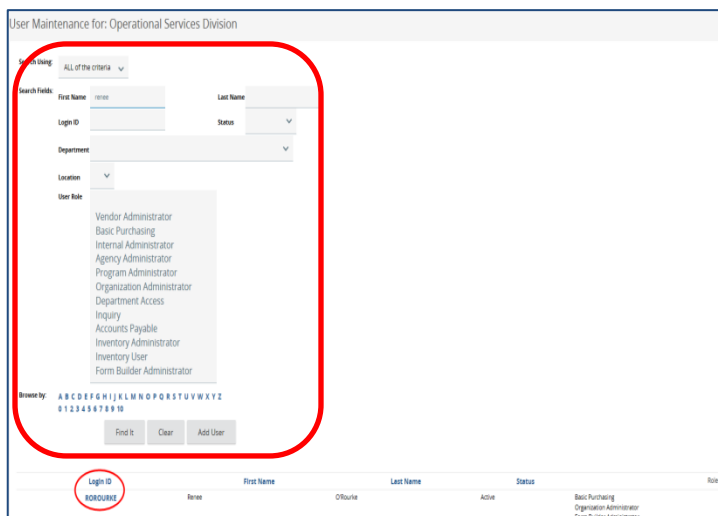
After logging in to COMMBUYS, from your Organization Administrator homepage, click on the **Maintain Agency Users** icon to add new users or edit current user profiles.

Step 2: Selecting the Login ID

The list of organization users displays.

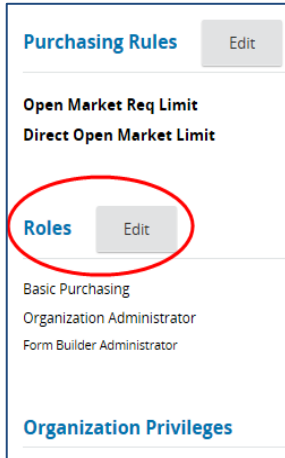
COMMBUYS opens a search box allowing you to search for an existing user with several different criteria types.

Below the search box is a list displaying existing users. Click on the **Login ID** of the user you wish to designate as a multi-org approver.



Screenshot

Directions



Purchasing Rules Edit

Open Market Req Limit
Direct Open Market Limit

Roles Edit

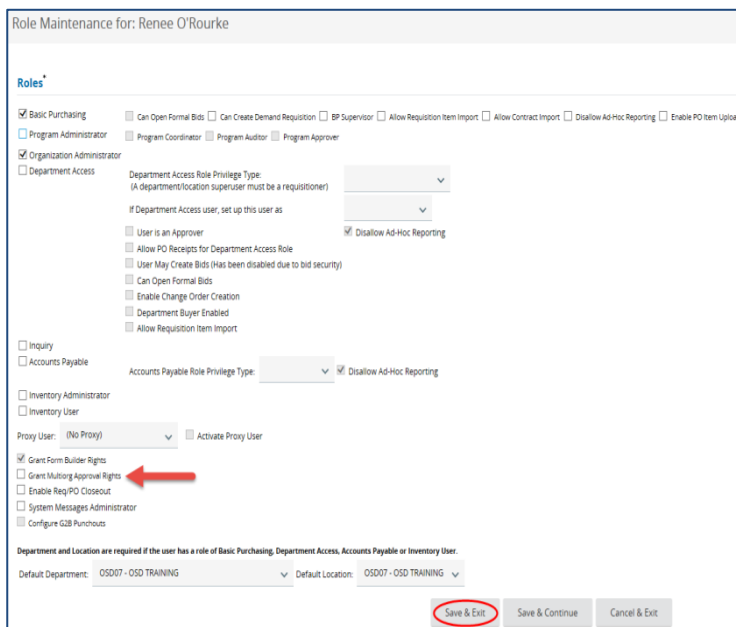
Basic Purchasing
Organization Administrator
Form Builder Administrator

Organization Privileges

Step 3: Editing the Roles

A User Maintenance page opens.

Click on the **Edit** button that is adjacent to the **Roles** heading.



Role Maintenance for: Renee O'Rourke

Roles

☒ Basic Purchasing ☐ Can Open Formal Bids ☐ Can Create Demand Requisition ☐ BP Supervisor ☐ Allow Requisition Item Import ☐ Allow Contract Import ☐ Disallow Ad-Hoc Reporting ☐ Enable PO Item Upload

☐ Program Administrator ☐ Program Coordinator ☐ Program Auditor ☐ Program Approver

☒ Organization Administrator

☐ Department Access

Department Access Role Privilege Type:

(A department/location supervisor must be a requisitioner)

If Department Access user, set up this user as

☐ User is an Approver ☒ Disallow Ad-Hoc Reporting

☐ Allow PO Receipts for Department Access Role

☐ User May Create Bids (has been disabled due to bid security)

☐ Can Open Formal Bids

☐ Enable Change Order Creation

☐ Department Buyer Enabled

☐ Allow Requisition Item Import

☐ Inquiry

☐ Accounts Payable

Accounts Payable Role Privilege Type: ☒ Disallow Ad-Hoc Reporting

☐ Inventory Administrator

☐ Inventory User

Proxy User: ☐ Activate Proxy User

☒ Grant Form Builder Rights

☐ Grant Multi-org Approval Rights

☐ Enable Req/PO Closeout

☐ System Messages Administrator

☐ Configure G2B Punchouts

Department and Location are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User.

Default Department: Default Location:

Save & Exit Save & Continue Cancel & Exit

Step 4: Granting Multi-org Approval Rights

The user role maintenance page opens.

1. Select the checkbox for: **Grant Multi-org Approval Rights**.
2. Click on the **Save & Exit** button when finished.

NOTE: The user to whom you granted multi-org approval rights can now be searched for and can be selected by an OA at a different organization.

Caution! In order to designate one of your organization's users as an approver on another organization's approval path, you must have a valid Interagency Service Agreement (ISA).

Use the Job Aid entitled *How to Create a Multi-Organization Approval Path* to add a user from another organization to your approval path.