## Job Aid:
How to Maintain Approval Paths

This Job Aid shows how to:

- Create, manage, and adjust approval paths in COMMBUYS.

Of Special Note:

Approval Paths are used to mirror employee authorizations/security roles, and they are entered into the system by the Organization Administrator (OA) after discussion with the Agency Chief Procurement Officer, Chief Fiscal Officer, and COMMBUYS liaisons. Thought and structure must be developed or known to ensure that approval paths are created properly. The OA has the ability to edit, add, or remove approval paths. When an OA assigns an approval path, he or she is able to choose to activate many filters or limits. These include boundaries on which departments/locations utilized the path. Additionally, the OA is able to define approval paths based on the dollar amount, the product or service (UNSPSC codes), and the type of document itself.
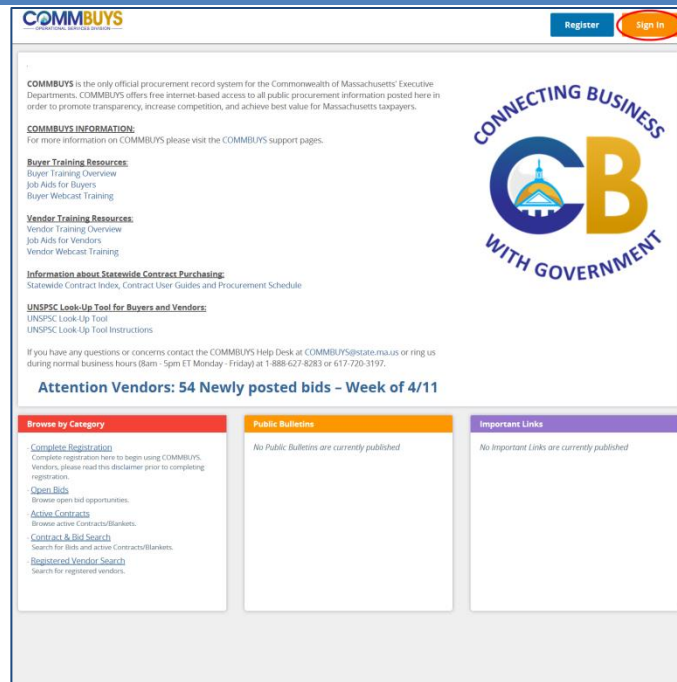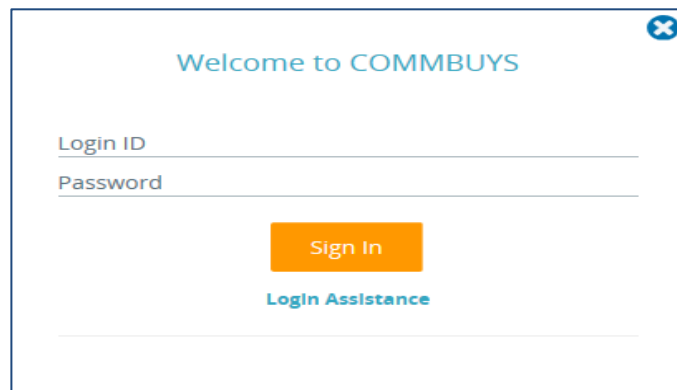
Screenshot	Directions
	Step 1: Signing in to COMMBUYS 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner. 3. Enter your Login ID and Password and click on the **Sign In** button.
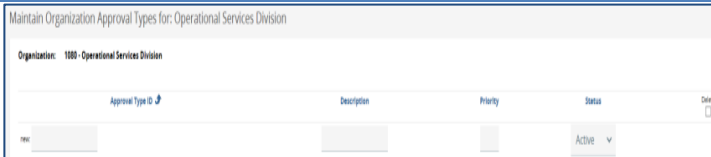
Screenshot	Directions

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

This is the OA's Homepage. The homepage opens on the Department/Approval/Users tab.

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

If you have already set up your approval settings, you can skip to Step 8 to set up a new approval path or edit a current one.

Step 3: Clicking the Configure Approval Settings Button

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.

Step 4: Preparing to Configure Approval Settings

The screen displays the **Approval Settings & Types** that your organization can currently 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

1) 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

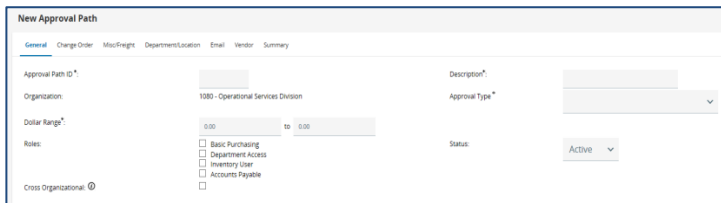| Screenshot	Directions
Maintain Organization Approval Types for: Operational Services Division Organization: 1080 - Operational Services Division Approval Type ID Description Priority Status Delete new: Active ∨	have been selected automatically, but you cannot change them. (this option is the default and recommended) **2) 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. 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 the **Save & Continue** button to save the current path and add another, or click the **Save & Exit** button.
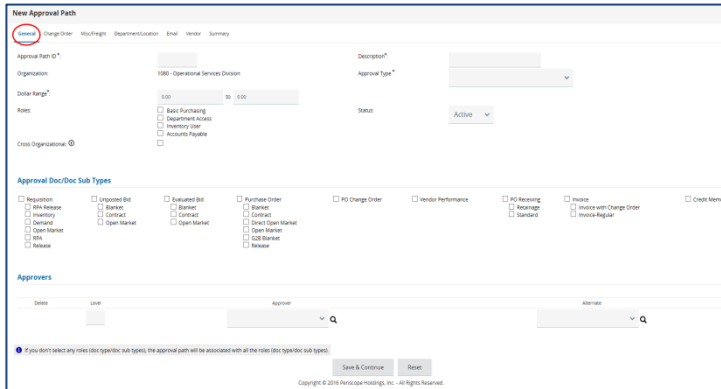
Screenshot	Directions

Step 5: Accessing the Maintain Agency Approval Paths and Settings Icon

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

Step 6: Editing/Creating 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.

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

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.

Screenshot	Directions

Step 7: Completing the Approval Path Screen

Enter the required information and move through the tabs from left to right.

Fill out the asterisked fields and click the **Save and Continue button**, then move to the next tab.
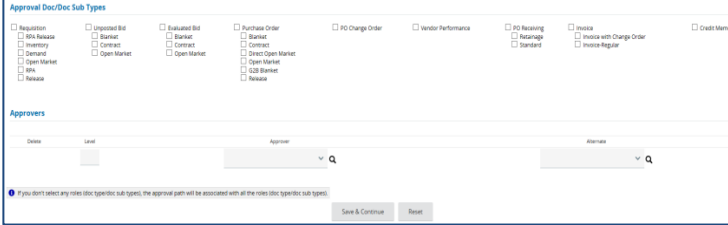
General Tab:
- **Approval Path ID** – a unique 5-digit alpha-numeric ID related to the use of the path. For example, if it is a path for a specific department, you may choose to utilize the first three characters of the department followed by a path number.
  - o If you add more paths for this department, you may choose to use the same first three characters followed by an incremental number
- **Description** (or Approval Path name) – The path name reflects what kind of path this is. For example, using the HR Approval type referenced above, this path could be named Contract Employee Approval.
- **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 in COMMBUYS)
- **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 N/A.
  - o If no roles are selected, this approval path will apply to documents that meet the other criteria regardless of the role of the user who submitted it for approval

Continued…

Screenshot	Directions

General Tab (continued):

- **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
- **Approvers -** Use the dropdown arrow to search for the desired approvers
- **Level -** Level 1 is the first approver, and if additional levels are needed, Level 2 would be the second approver, and so on
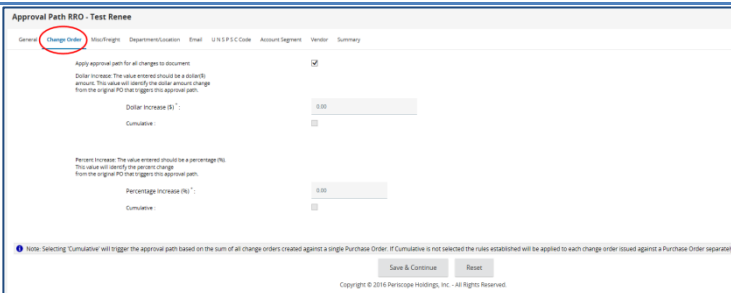
NOTE: A Primary approver means a required approver. An alternate approver, if chosen, will make the document available to both approvers so either one can approve for the document to move forward.

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

NOTE: If you are an agency who needs an approver who works for another agency, please read the two job aids:
- How to Create a Multi-organization Approver Path
- How to Create a Multi-organization Approver User

See the Job Aids for Buyers page > Job Aids for Buyers

Step 8: Accessing the Change Order Tab

NOTE: To access the Change Order tab, you must check the **PO Change Order** box under doc types in the previous screen in the **Approval Doc/Doc Sub Types** section.

You may set the approval path to be triggered for any change to the document. You may also enter the dollar total or percentage change.
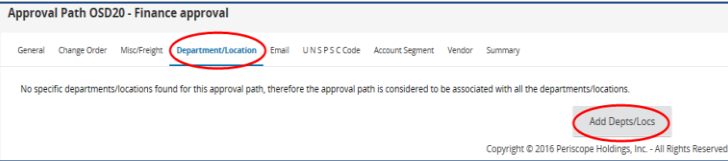
NOTE: The Misc /Freight tab is not applicable at this time.

![OSD Operational Services Division logo]

Job Aid:
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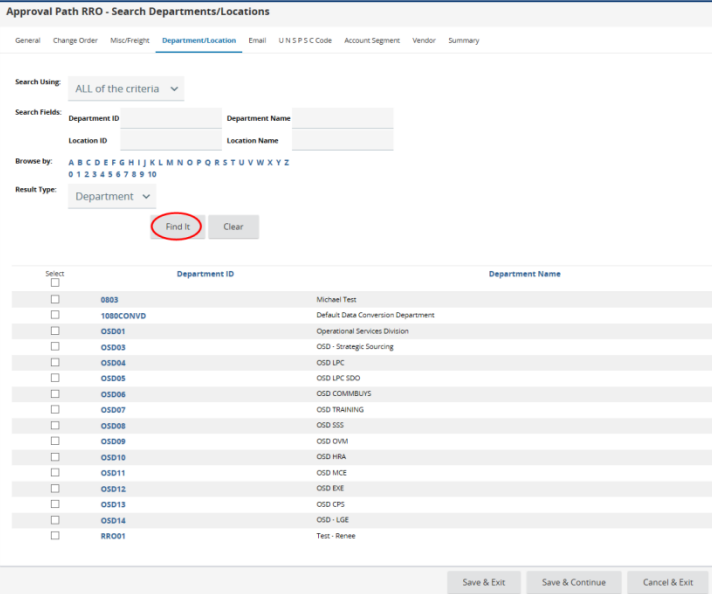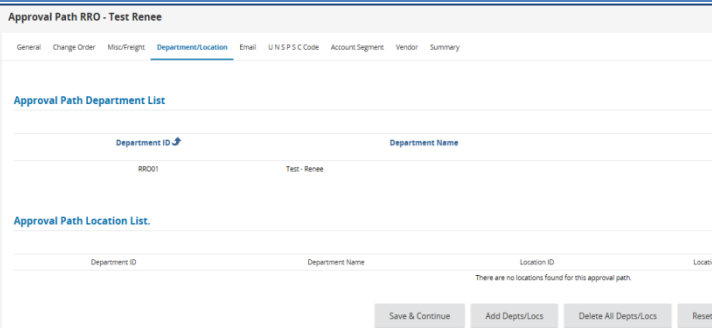| Screenshot	Directions
Approval Path OSD20 - Finance approval General Change Order Misc/Freight **Department/Location** Email U N S P S C Code Account Segment Vendor Summary No specific departments/locations found for this approval path, therefore the approval path is considered to be associated with all the departments/locations. **Add Depts/Locs** Copyright © 2016 Periscope Holdings, Inc. - All Rights Reserved.	**Step 9: Accessing the Department/Location Tab** This section allows you to choose the departments and locations to which this path will apply. If a department or location is not chosen, this path will apply to all departments Select **Add Dept/Locs** and search for the department to add. You may also add locations here.
Approval Path RRO - Search Departments/Locations General Change Order Misc/Freight Department/Location Email U N S P S C Code Account Segment Vendor Summary Search Using: ALL of the criteria Search Fields: Department ID / Department Name / Location ID / Location Name 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: Department **Find It Clear** Select / Department ID / Department Name ☐ 0803 — Michael Test ☐ 1080CONVD — Default Data Conversion Department ☐ OSD01 — Operational Services Division ☐ OSD03 — OSD - Strategic Sourcing ☐ OSD04 — OSD LPC ☐ OSD05 — OSD LPC SDO ☐ OSD06 — OSD COMMBUYS ☐ OSD07 — OSD TRAINING ☐ OSD08 — OSD SSS ☐ OSD09 — OSD OVM ☐ OSD10 — OSD HRA ☐ OSD11 — OSD MCE ☐ OSD12 — OSD EXE ☐ OSD13 — OSD CPS ☐ OSD14 — OSD - LGE ☐ RRO01 — Test - Renee Save & Exit Save & Continue Cancel & Exit	**Step 10: Searching for Departments/Locations** The Department and Location search screen appears. This is the information populated from clicking on the **Find It** button. Select the appropriate Department ID by clicking in the checkbox in the **Select** column (which will select all locations within that department). Or, click on the blue hyperlink in the **Department ID** column, and select the desired locations within that department. Click the **Save & Continue** button to select another Department ID or click the **Save & Exit** button if you are finished adding all Dept/Locs.
Approval Path RRO - Test Renee General Change Order Misc/Freight **Department/Location** Email U N S P S C Code Account Segment Vendor Summary **Approval Path Department List** Department ID / Department Name RRO01 — Test - Renee **Approval Path Location List.** Department ID / Department Name / Location ID / Location There are no locations found for this approval path. Save & Continue Add Depts/Locs Delete All Depts/Locs Reset	**Step 11: Viewing the Changes** This is the screen view once the department has been added correctly.

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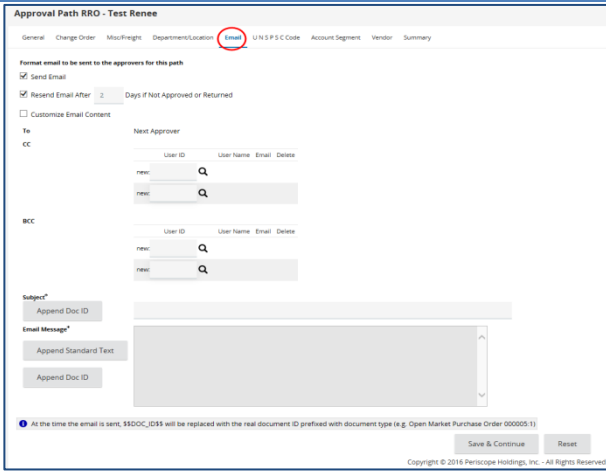
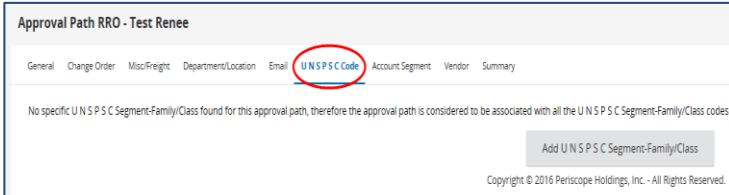| Screenshot	Directions
	Step 12: Accessing the Email Tab The default is checked to send an email to the approvers for this path. You have the ability to select the number of days you would like to send another reminder. You may select additional cc'd individuals within the COMMBUYS system, and you may also customize the content of the email. • **Resend Email After _ Days if Not Approved or Returned**. – check to activate and enter the number of days • **Customize Email Content** – check to activate the remaining customization fields on the page • **To/CC/BCC** – select additional registered users within your organization that you would like to carbon copy or blind carbon copy on the email. **NOTE:** This does not give those additional email recipients the ability to approve or disapprove a document.
	Step 13: Accessing the UNSPSC Code Tab If you would like to have only certain United Nations Standard Products and Services Codes (UNSPSC) go through their own approval path, click the **Add UNSPSC Segment-Family/Class** button and select the codes. A path that has this feature enabled applies to all departments in the organization, meaning that, if you create an approval path based on a Department/Location, you should <u>not</u> also add a UNSPSC Code to that path. **NOTE:** **Account Segment** and **Vendor** tab are not applicable at this time.
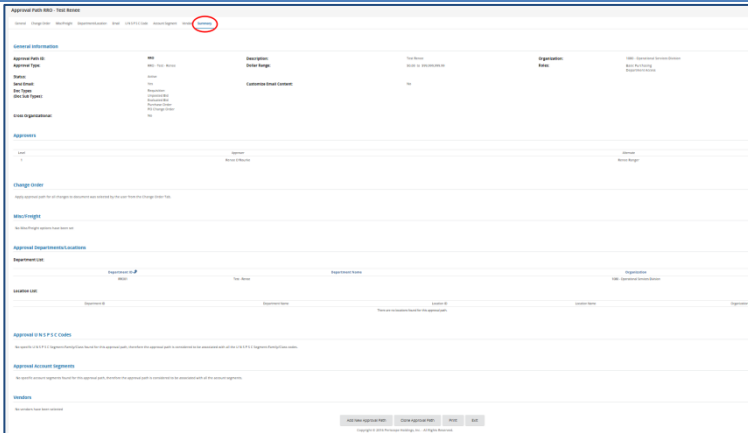
Screenshot	Directions
	Step 14: Accessing the Summary Tab This tab allows you to view all of the criteria entered for this path. If you need to create another very similar approval path, you can click on the **Clone Approval Path** button on the bottom of the page to create and edit a copy of the approval path you are currently viewing. The path does not require submission and is active, unless otherwise changed. If you have chosen to clone the approval path, all original information will populate in the new path. Navigate through the tabs (shown above) to customize the path.