

Job Aid: How to Maintain Approval Paths

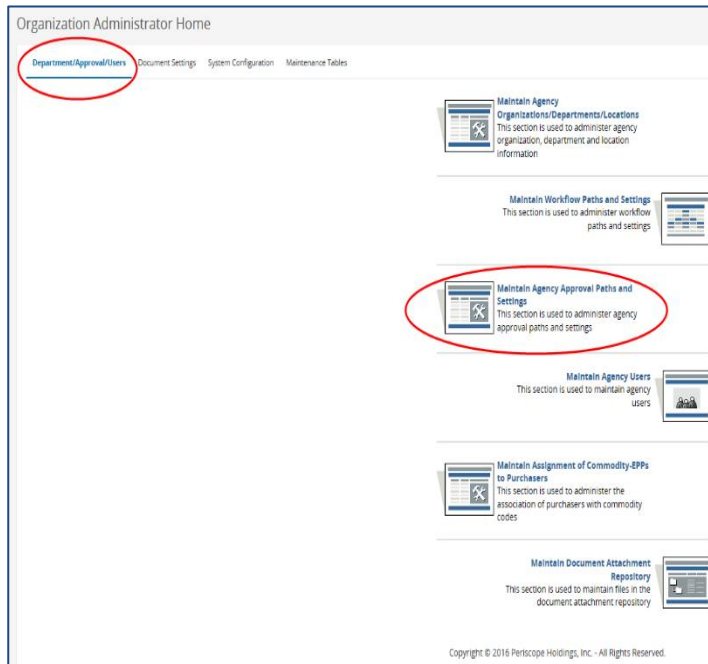
This Job Aid shows how to:

- 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 Chief Procurement Officer, Chief Fiscal Officer, or other responsible authority. 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: 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.

1. If you have already set up your approval settings, you can skip to Step 4 to set up a new approval path or edit a current one.

Approval Path Maintenance for: Operational Services Division

| Path ID | Name | Organization | Approval Type | Dollar Range From | Dollar Range To | Status | Priority |
|---------|-------------------------|--------------------------------------|----------------------------------|-------------------|--------------------|----------|----------|
| 04884 | OWH-CA Approval 1 | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$0.999,999,999.99 | Inactive | 10 |
| 04882 | OWH-CA Approval 2 | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$0.999,999,999.99 | Active | 10 |
| 05040 | Pay - SL | 1000 - Operational Services Division | OSD-05 - Finance Approval | \$0.00 | \$500.00 | Inactive | 30 |
| 05054 | OSD LFC | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05069 | OSD LFC 202 | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05066 | OSD COMBUDS | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Inactive | 10 |
| 05067 | OSD TRAINING | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Inactive | 10 |
| 05068 | OSD ISO | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05068A | OSD ISO | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05010 | OSD HRA | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05011 | OSD MCE | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05012 | OSD ENE | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05013 | OSD CFS | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05014 | OSD LSE | 1000 - Operational Services Division | OSD-10 - Departmental Approval | \$0.00 | \$999,999,999.99 | Active | 10 |
| 05020 | Finance Approval | 1000 - Operational Services Division | OSD-02 - Finance Approval | \$0.00 | \$999,999,999.99 | Active | 20 |
| 05039 | Sourcing Team Approvals | 1000 - Operational Services Division | OSD-05 - Sourcing Team Approvals | \$0.00 | \$0.999,999,999.99 | Inactive | 30 |
| 05032 | Sourcing Team Approvals | 1000 - Operational Services Division | OSD-05 - Sourcing Team Approvals | \$0.00 | \$0.999,999,999.99 | Active | 30 |
| 05033 | Sourcing Team Approvals | 1000 - Operational Services Division | OSD-05 - Sourcing Team Approvals | \$0.00 | \$0.999,999,999.99 | Inactive | 30 |
| 05030 | Test Review | 1000 - Operational Services Division | HRD - Test Review | \$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: 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 3: Preparing to Configure Approval Settings

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

Agency as, 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 Setting

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

Non-Auto Cascading – The Buyer will be able to select from any and all specified Approval Paths.

Auto Cascading – The Buyer will see the paths that 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-digit 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

Maintain Organization Approval Setting for: Operational Services Division

Organization

Cascade Setting

No Cascading
Auto Cascading
Non-Auto Cascading

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 the current type and add another or click on the **Save & Exit** button.

Approval Path Maintenance for: Operational Services Division

| Path ID | Name | Organization | Approval Type | Dollar Range From | Dollar Range To | Status | Priority |
|---------|-----------------------|------------------------------------|-----------------------------|-------------------|------------------------|----------|----------|
| 00001 | COM On Approval 1 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$0.000.000.000.00 | Develp | 10 |
| 00002 | COM On Approval 2 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$0.000.000.000.000.00 | Active | 10 |
| 00003 | Test 10 | 1000 Operational Services Division | 00020 Finance Approval | \$0.00 | \$000.00 | InActive | 20 |
| 00004 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00005 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00006 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | InActive | 10 |
| 00007 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | InActive | 10 |
| 00008 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00009 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00010 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00011 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00012 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00013 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00014 | 00010 | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$000.000.000.000.00 | Active | 10 |
| 00015 | Finance Approval | 1000 Operational Services Division | 00020 Finance Approval | \$0.00 | \$000.000.000.000.00 | Active | 20 |
| 00016 | Scoring Team Approval | 1000 Operational Services Division | 00030 Scoring Team Approval | \$0.00 | \$0.000.000.000.000.00 | InActive | 30 |
| 00017 | Scoring Team Approval | 1000 Operational Services Division | 00030 Scoring Team Approval | \$0.00 | \$0.000.000.000.000.00 | Active | 30 |
| 00018 | Scoring Team Approval | 1000 Operational Services Division | 00030 Scoring Team Approval | \$0.00 | \$0.000.000.000.000.00 | InActive | 30 |
| 00019 | Scoring Team Approval | 1000 Operational Services Division | 00030 Scoring Team Approval | \$0.00 | \$0.000.000.000.000.00 | InActive | 30 |
| 00020 | Test Server | 1000 Operational Services Division | 00010 Departmental Approval | \$0.00 | \$00.000.000.00 | Active | 1 |

[Add New Approval Path](#)
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Step 4: Editing/Creating Approval Paths

From the **Approval Path Maintenance** page, 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.

Step 5: Completing the Approval Path Screen

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

Fill out the asterisked fields, click on the **Save and Continue** button, then move to the next tab.

The **General** Tab is currently displayed.

- **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. 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, it could be the name of the department who it pertains to.
- **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** – who this path pertains to. A Basic Purchasing user and/or a Department Access user. **NOTE:** Inventory and Accounts Payable is N/A.
- **Approval Doc/Doc Sub Types** – select all the types of documents that will apply to this path
- **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

Step 6: 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.

Step 7: 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.

If you want to select a specific department or location, select **Add Dept/Locs** and search for the department to add. You may also search by locations here.

NOTE: If you choose to add a department or location you should create additional approval paths to ensure that you have your entire organization covered.

Approval Path RRO - Search Departments/Locations

General Change Order Misc/Freight Department/Location Email UNSPSC 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 |
|--------------------------|---------------|------------------------------------|
| <input type="checkbox"/> | 0803 | Michael Test |
| <input type="checkbox"/> | 1080CONVID | Default Data Conversion Department |
| <input type="checkbox"/> | OSD01 | Operational Services Division |
| <input type="checkbox"/> | OSD03 | OSD - Strategic Sourcing |
| <input type="checkbox"/> | OSD04 | OSD LPC |
| <input type="checkbox"/> | OSD05 | OSD LPC SDO |
| <input type="checkbox"/> | OSD06 | OSD COMMBUS |
| <input type="checkbox"/> | OSD07 | OSD TRAINING |
| <input type="checkbox"/> | OSD08 | OSD SSS |
| <input type="checkbox"/> | OSD09 | OSD OVM |
| <input type="checkbox"/> | OSD10 | OSD HRA |
| <input type="checkbox"/> | OSD11 | OSD MCE |
| <input type="checkbox"/> | OSD12 | OSD ENE |
| <input type="checkbox"/> | OSD13 | OSD CPS |
| <input type="checkbox"/> | OSD14 | OSD - LGE |
| <input type="checkbox"/> | RR001 | Test - Renee |

Save & Exit Save & Continue Cancel & Exit

Step 8: Searching for Departments/Locations

The Department and Location search screen appears. Clicking on the **Find It** button will display all the departments set up in your agency.

Select the appropriate Department 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 on the **Save & Continue** button to select another Department ID or click on the **Save & Exit** button if you are finished adding all Dept/Locs.

Step 9: Viewing the Changes

Your page refreshes and this is the screen view once the department has been added correctly.

Approval Path RRO - Test Renee

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

Approval Path Department List

| Department ID | Department Name |
|---------------|-----------------|
| RR001 | 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 10: 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 11: 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 on 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 not also add a UNSPSC Code to that path.

NOTE: **Account Segment** and **Vendor** tabs are not applicable at this time.

Step 12: Accessing the Summary Tab

This tab allows you to view all of the criteria 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 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.

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.