Copying a rule:

Begin by hovering over the “Setup” flyout menu to the left of your screen. You can then select “Workflow Setup” and then either “Requisition Workflow Setup” or “Invoice Workflow setup”. (Requisition will be used for this example)
Next click on the “Advanced Dynamic Workflow” tab at the top of the page.
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Then “Rules Management”
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From the “Rule Group” dropdown menu select the appropriate rule group - Department Allocator, Department Code Final Approver, etc.
Enter the name of the rule that you want to copy in the “Rule Name” field and click “Search”
The Rule you entered will be displayed. Select the check box for the rule you want to copy.

Then select “Copy to one or more Rule Groups” from the dropdown menu and click “Go”.

![Aggiebuy ADMIN Quick Reference Guide](image-url)
You will then select what Rule Group you want to copy to and click “Copy”. In this example we are copying a Department Allocator rule to a Department Allocator rule. It is recommended that you copy to the same type of rule you are copying from.
The copy will be displayed at the bottom of the page and will be set to inactive. Copying a rule will also copy all approvers listed on that rule.
Click on “edit” for the inactive rule
Here, you can edit the rule for the appropriate department with the appropriate approvers. Click on the edit button in the “Rule Info” box.
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Edit the rule info. - Change the display name to show the proper department and remove the extraneous numbers at the end ("-01" or "02" etc)

You will not be able to edit the “Internal Name”-this will remain the same

Enter the rule description in the text box. When all updates have been made click “Save”

Example-Before changes
Example-After changes
Update the “Document-Level Rules” or “Line-Level Rules by clicking on “edit”.

Currently, the Requisition Allocator rules are the only ones that will use Document Level. The rest will use Line Level.

**Note-an example of a rule that uses Line Level can be found on the last page of this guide**
At the Document level - Select “edit”. Highlight the departments in the “Selected Departments” box that should be removed and use the arrow to remove them.
Then move over the correct department and click “Save”
Now you can update your Approvers. In the “Approvers” box add or remove Approvers as needed using the “Add Approver” and “Remove Selected Approvers” buttons.
Once you have edited all three sections you can go back into the “Rule Info” box and activate the rule. Click on “edit” then check the box next to “Active”
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Adding departments to a rule at the Line level

Select “edit” for Line Level Rules
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Rather than choosing the department from a list, you will type in the department name. Be sure to preface the department name with your System part (02, 24, 28 etc) and a dash as seen in the example below. **Department codes should always be capatalized.**
If you are adding multiple departments, list them vertically with no commas or periods.