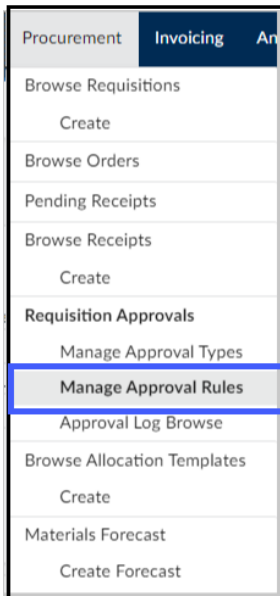


Creating Approval Rules

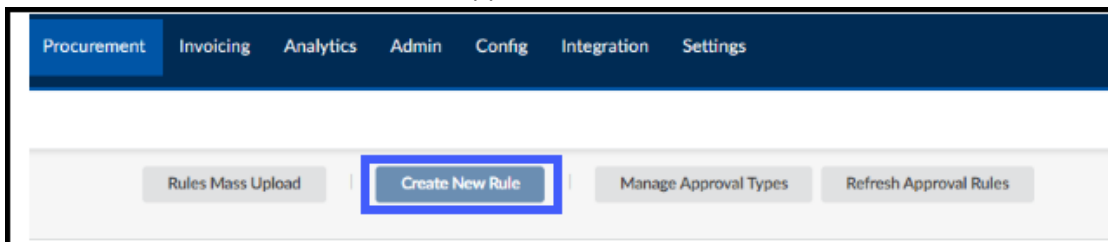
This document is a quick reference guide for Agency Administrators to create new approval rules in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: <https://spo.az.gov/>.

Creating Approval Rules

1. Log into APP as an **Agency Administrator**.
2. Navigate to **Manage Approval Rules** from the **Procurement tab**.



3. Click Create New Rule to create a new approval rule.



4. Complete the appropriate approval rule information, including all mandatory fields identified by a red asterisk (*).

The screenshot shows a web form titled "Create Approval Rule". At the top right, there are window control icons. Below the title, there are three buttons: "Save", "Save & Close", and "Close". The form fields are as follows:

- Approval Type ID***: A dropdown menu with a callout bubble containing the number 5.
- Location Scope***: A dropdown menu with a callout bubble containing the number 6.
- Commodity**: A dropdown menu.
- Requisition Type***: A dropdown menu with a callout bubble containing the number 7.
- Function**: A dropdown menu.
- Object**: A dropdown menu.
- Lower Threshold***: A text input field with a callout bubble containing the number 8.
- Upper Threshold***: A text input field with a callout bubble containing the number 9.
- Rule Order***: A text input field.
- Rule Status***: A dropdown menu with "Valid" selected and a refresh icon.
- Approvers**: A section header above a dropdown menu.

5. **Approval Type ID** - Identifies what type of approval rule is used within the agency, i.e. Procurement, Finance, Division, Authority Level, etc.
*Note: Reference your agency's current approval types for a better understanding by navigating to **Manage Approval Types** under the Procurement tab.*
6. **Location Scope** - Determines the level the approval rule's trigger, i.e.. Agency, Division, Department, Site.
7. **Requisition Type** - This field is used to determine the requisition type the approval rule will be used for I.E. On- Contract, Off- Contract, After the Fact, Punchout.
8. **Lower Threshold** - Used to determine the lowest dollar value amount the rule triggers, i.e. Only Trigger at requisitions amounts over \$100,000 or set to \$0 to see all amounts etc.
9. **Upper Threshold** - Used to determine the Highest dollar value amount the rule triggers, i.e Only Trigger at requisitions at maximum of \$100,000 or set to \$99,999,999.99 to see all amounts etc.

Note: The following are **optional** fields:

The screenshot shows a web form titled "Create Approval Rule" with a search icon, a refresh icon, a close icon, and a window close icon in the top right corner. Below the title are three buttons: "Save", "Save & Close", and "Close". The form contains several dropdown menus and text input fields. Callouts 10 through 14 are placed next to the following fields: 10. Function, 11. Object, 12. Rule Order, 13. Rule Status (radio button), and 14. Approvers. The other fields are: Approval Type ID*, Location Scope*, Commodity, Requisition Type*, Lower Threshold*, Upper Threshold*, and Rule Order* (text input).

10. **Function** - Used in accordance with agency budget information, leave blank if not using budget based approval rules.
11. **Object** - Used in accordance with agency budget information, leave blank if not using budget based approval rules.
12. **Rule Order** -Used to determine the order that each rule will be triggered in accordance with the Approval Type ID values. EX: Trigger rule one at type order 10 for procurement, trigger rule two at type order 20 for Senior Procurement, etc.
13. **Rule Status** - Used to toggle Approval Rules On/Off (use cautiously, as this will typically not automatically update for requisitions that already have a workflow established).
14. **Approvers** - This field is used to determine which Approver/Approvers will be notified to approve.
Note: The user must have the "Approver" role within APP to appear under this listing.