# ARIZONA
PROCUREMENT PORTAL
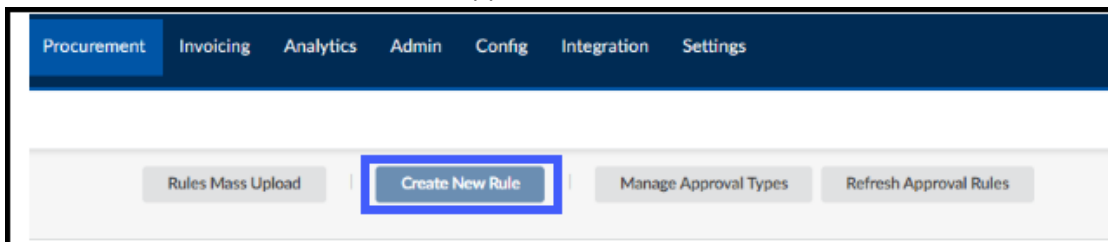
Creating Approval Rules

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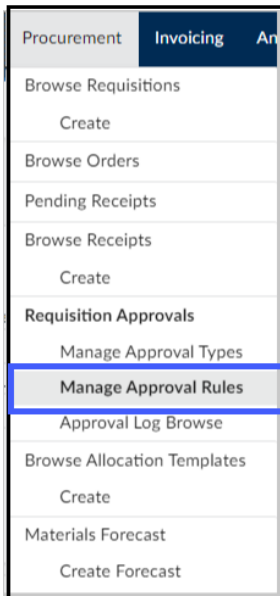
3. Click Create New Rule to create a new approval rule.

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

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 - T**his 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:*

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.*