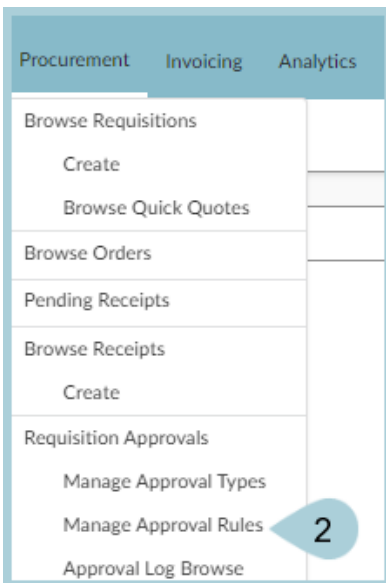


# Creating Approval Rules

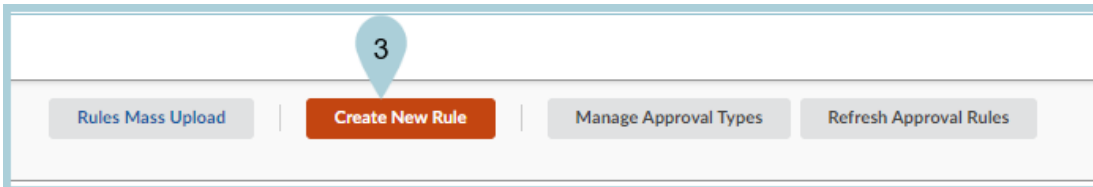
This document is a quick reference guide for Agency Administrators to create new approval rules in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at [app@azdoa.gov](mailto:app@azdoa.gov). Additional resources are also available on the SPO website: <https://spo.az.gov/>.

## 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 the type of approval rule used within the agency, i.e., Procurement, Finance, Division, Authority Level, etc.



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 approval rule's trigger level, i.e., Agency, Division, Department, Site.
7. Requisition Type - This field determines 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 a maximum of \$100,000 or set to \$99,999,999.99 to see all amounts, etc.

The screenshot shows a web form titled "Create Approval Rule" with a header bar containing "Save", "Save & Close", and "Close" buttons. The form is divided into two main sections: "Create New Approval Rule" and "Approvers".

The "Create New Approval Rule" section contains the following fields:

- Approval Type ID\* (dropdown menu, callout 5)
- Location Scope\* (dropdown menu, callout 6)
- Commodity (dropdown menu)
- Requisition Type\* (dropdown menu, callout 7)
- Function (dropdown menu)
- Object (dropdown menu)
- Lower Threshold\* (text input, callout 8)
- Upper Threshold\* (text input, callout 9)
- Rule Order\* (text input)
- Rule Status\* (dropdown menu with "Valid" selected)

The "Approvers" section contains:

- Approvers\* (dropdown menu)



The following fields are optional.

10. Function - Used by agency budget information, leave blank if not using budget based approval rules.
11. Object - Used by 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.

The screenshot shows a web form titled "Create Approval Rule" with a toolbar containing "Save", "Save & Close", and "Close" buttons. The form fields are as follows:

- Approval Type ID\* (dropdown)
- Location Scope\* (dropdown)
- Commodity (dropdown)
- Requisition Type\* (dropdown)
- Function (dropdown) - Callout 10
- Object (dropdown) - Callout 11
- Lower Threshold\* (text input)
- Upper Threshold\* (text input)
- Rule Order\* (text input) - Callout 12
- Rule Status\* (radio button, currently "Valid") - Callout 13
- Approvers (section header)
- Approvers\* (dropdown) - Callout 14

## Resources

Click the link below for more information on **Agency Admin** processes in APP:

<https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/app-agency-admin-qrgs-176>