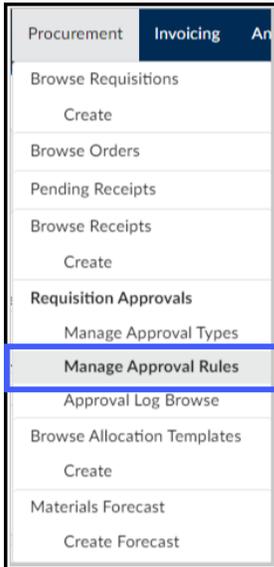


Managing Existing Approval Rules

This document is a quick reference guide for Agency Administrators to manage previously created 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/>.

Managing Existing Approval Rules

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



3. Locate the existing approval rule you wish to modify.
4. Click the **pencil** icon to open the Edit Approval Rules menu.



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

The screenshot shows the 'Edit Approval Rules' interface. At the top, there are buttons for 'Save', 'Save & Close', and 'Close'. A notification bar states 'Fields marked by an asterisk * are mandatory'. The form fields are as follows:

- Rule ID:** 9076
- Approval Type ID:** GFA-Supervisor
- Commodity:** (Field 6)
- Object:** (Dropdown menu)
- Purchasing Type:** On-Contract (Field 7)
- Function:** (Dropdown menu)
- Location Scope:** WMWC (Field 8)
- Upper Threshold:** 999,999,999.99... (Field 9)
- Lower Threshold:** 0.00 (Field 10)
- Rule Order:** 10
- Rule Status:** Valid

Below the main form is a section titled 'Add approvers to this rule' with a list of 'Approvers': Knutson Keith, Sprague Scott, and Wilcox Renee.

6. **Commodity** - Used to determine if you wish to have the designated approval rule trigger based on the type of Commodity Code selected by the requisitioner.
7. **Purchasing Type** - Used to determine the requisition type the approval rule will be used for, i.e. On-Contract, Off- Contract, After the Fact, Punchout.
8. **Location scope** - Used to determine the level the approval rule triggers, i.e. Agency, Division, Department, Site.
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.
10. **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.

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

The screenshot shows the 'Edit Approval Rules' interface. At the top, there are three buttons: 'Save', 'Save & Close', and 'Close'. Below them is a notification bar stating 'Fields marked by an asterisk * are mandatory'. The main form area contains the following fields:

- Rule ID:** 9076
- Approval Type ID:** GFA-Supervisor
- Commodity:** (empty)
- Object:** (empty, callout 11)
- Purchasing Type*:** On-Contract
- Function:** (empty, callout 12)
- Location Scope*:** WMWC
- Upper Threshold*:** 999,999,999,99...
- Lower Threshold*:** 0.00
- Rule Order*:** 10 (callout 13)
- Rule Status*:** Valid (callout 14)
- Add approvers to this rule:**
 - Approvers*:** Knutson Keith, Sprague Scott, Wilcox Renee (callout 15)

11. **Object** - Used in accordance with agency budget information, leave blank if not using budget based approval rules.
12. **Function** - Used in accordance with agency budget information, leave blank if not using budget based approval rules.
13. **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.
14. **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).
15. **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.
16. Click **Save & Close**.