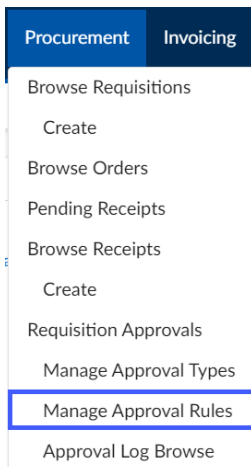


## Update Approval Rules Part 1 - Updating Approval Rules in APP

The purpose of this document is to provide guidance on how to properly update approvers on approval rules and in user profiles. By following this QRG, you will ensure all active approval rules have valid approvers listed when you click on the Refresh Approval Rules button on the Manage Approver Rules page. If you have any questions, please contact the APP Help Desk at [app@azdoa.gov](mailto:app@azdoa.gov) or by phone at 602-542-7600. The APP help desk is open Monday – Friday from 7am to 5pm MST.

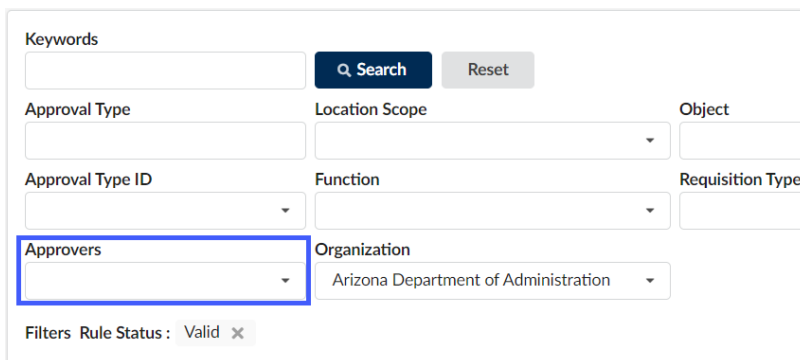
### Updating Approval Rules

1. Go to Procurement > Manage Approval Rules:



The screenshot shows a navigation menu with two tabs: 'Procurement' (selected) and 'Invoicing'. Under 'Procurement', the following items are listed: 'Browse Requisitions', 'Create', 'Browse Orders', 'Pending Receipts', 'Browse Receipts', 'Create', 'Requisition Approvals', 'Manage Approval Types', 'Manage Approval Rules' (highlighted with a blue box), and 'Approval Log Browse'.

2. Using the Approvers filter, type in the User's name that will be replaced or removed from the approval rule then click Search:



The screenshot shows a search interface with the following fields and controls:

- Keywords:  [Search] [Reset]
- Approval Type:
- Location Scope:
- Object:
- Approval Type ID:
- Function:
- Requisition Type:
- Approvers:  (highlighted with a blue box)
- Organization:  (value: Arizona Department of Administration)
- Filters Rule Status: Valid x

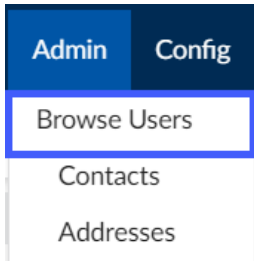
# ARIZONA

PROCUREMENT PORTAL

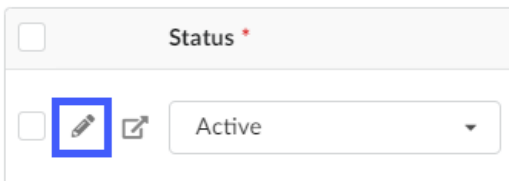
- Click on the Pencil icon next to the approval rule to update the rule's approvers or delete the approval rule entirely, then click Save to save the Changes:

- Once all approver rules have been updated, click Reset to refresh the Manage Approval Rules page. Right-click on the approval rule header and click Download in Excel Format. This will download your agency's current active approval rules in APP. (downloading the approval rules will provide a check to make sure only those rules you want to update are changed after Part 2 of this process):

5. To update the approver users' profile go to Admin > Browse Users:



6. Locate the user that will no longer be an approver and click on the pencil icon to edit the users' profile:



7. If the user's approver role is to be removed, uncheck the approver role checkbox. If the user's account is to be deleted, change the status to Deleted. Once complete, click Save and Close:

