# ARIZONA
PROCUREMENT PORTAL
QUICK REFERENCE GUIDE

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: hps://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**.
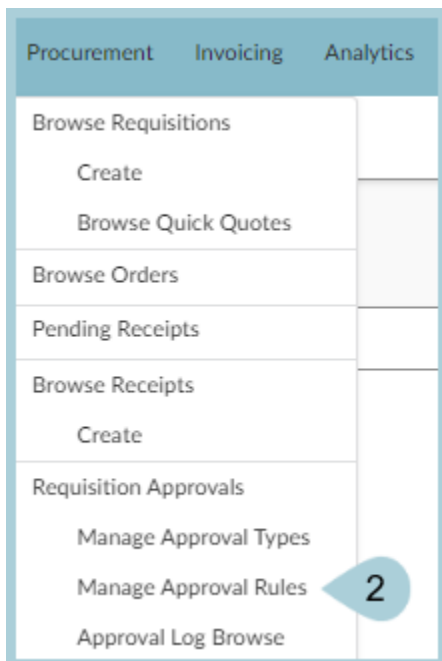
3. Locate the existing approval rule you wish to modify.
4. Click the **Pencil** icon to open the Edit Approval Rules menu.
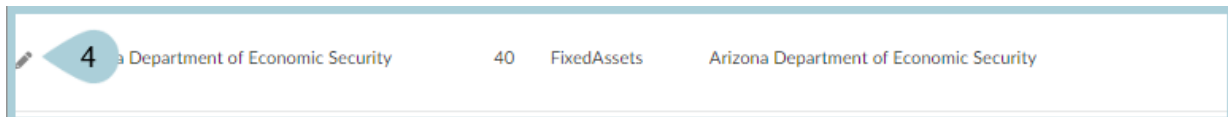
5. Complete the appropriate approval rule information, including all mandatory fields identified by a red asterisk (*).

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 requisition amounts over $100,000 or set to $0 to see all amounts, etc.

The following are optional fields.

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.
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**.

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