

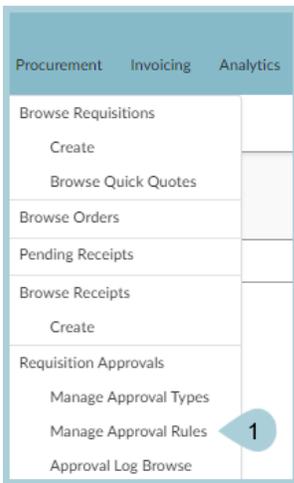
Updating Approval Rules in APP - Part 1

This document is a quick reference guide for users to properly update approvers on approval rules and in user profiles 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/>.

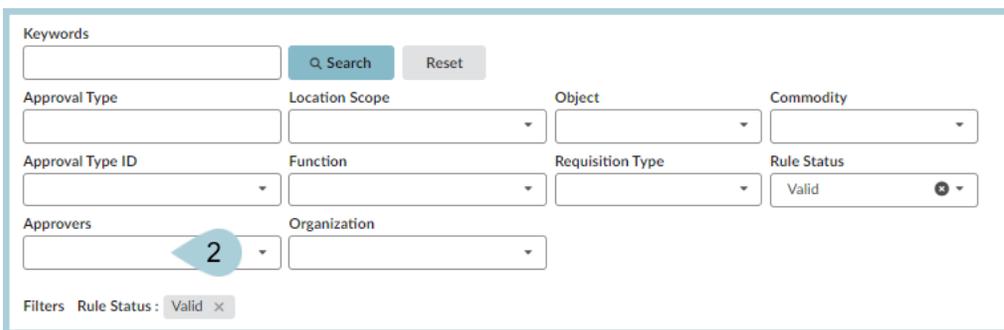
Following this, QRG ensures all active approval rules have valid approvers listed when you click the Refresh Approval Rules button on the Manage Approver Rules page.

Updating Approval Rules

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



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



3. Click 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.

Agency	Type Order	Approval Type	Location Scope
 3 Department of Economic Security	40	FixedAssets	Arizona Department of Economic Security

Edit Approval Rules

Edit Approval Rules

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Rule ID	9111	Approval Type ID	DEA-FixedAssets
Commodity		Object	8111 - Land And Land Imprvmt Capital Purchase
Purchasing Type*	Off-Contract	Function	
Location Scope*	Arizona Department of Economic Security		
Upper Threshold*	10,000,000,000...	Lower Threshold*	0.00
Rule Order*	33	Rule Status*	Valid

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Add approvers to this rule

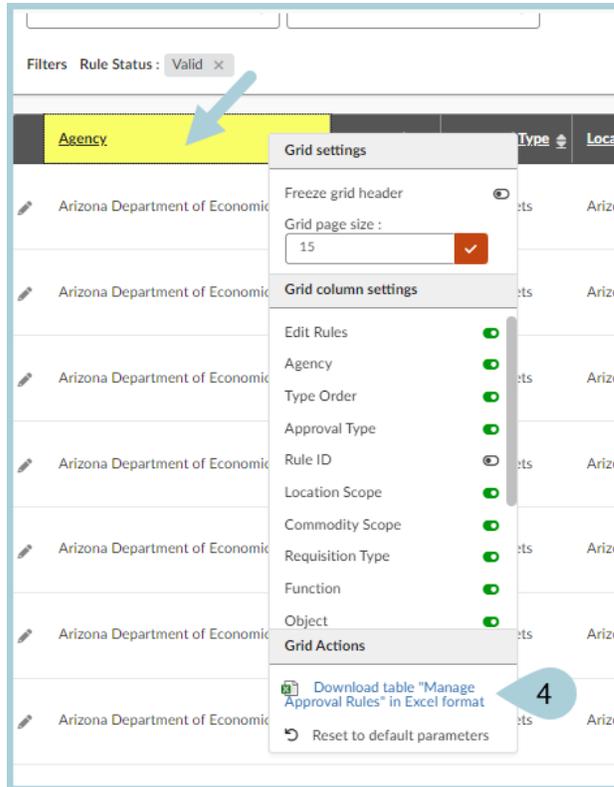
Approvers*

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- 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 downloads your agency's current active approval rules in APP.



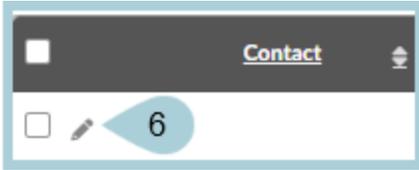
Downloading the approval rules will provide a check to make sure only those rules you want to update are changed after Part 2 of this process.



- To update the approver user's profile, to go the **Admin** header tab and select **Browse Users**.



- Locate the user that will no longer hold the approver role, and click on the **Pencil** icon to edit the user's 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 & Close**.

 A screenshot of a web-based user management interface. The page is divided into several sections:

- Login**: Includes fields for 'Login' and 'Password', with radio buttons for 'Authentication mode' (Password selected, SSO) and a checkbox for 'Enable 2FA'.
- Identity**: Contains fields for 'Gender', 'First Name*', 'Owner Last Name*', 'Email*', 'Position', and 'Status' (set to 'Deleted'). A blue callout bubble with the number '7' points to the 'Status' dropdown.
- Delegated Amount (Sourcing Events)**: A section with a 'Value' input field.
- Phone**: Fields for 'Phone' and 'Cell Phone'.
- Last Connection**: Shows 'No available information'.
- Tracking**: A section at the bottom.
- Template for profiles and perimeter**: Includes a checkbox 'Is a template', a 'Template' dropdown, and a '7' callout bubble.
- Internal profiles**: A list of roles with checkboxes: Agency SRM, Analyst (View), AP Manager, AP Supervisor, AP Technician, Approver (checked), Auditor, CEO, CFO, Cooperative Program Manager, Docusign API, EAI API, Executive Dashboard Viewer, Finance, GAO SRM, Group Controller, Inquiry (checked), and Planner/Inventory Manager.

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>