

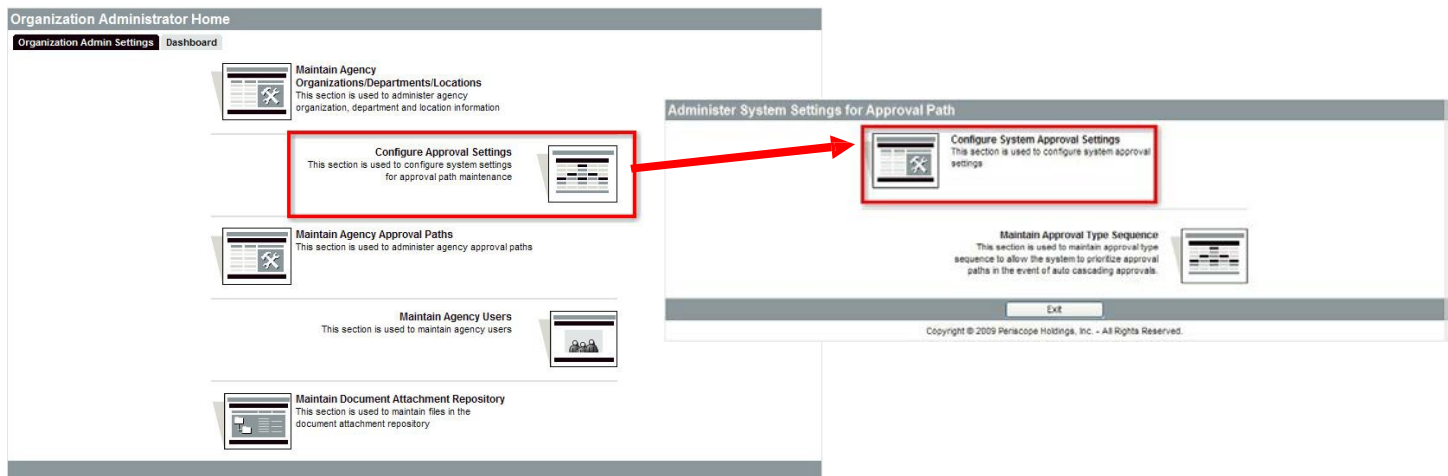
Approval Path Management

Approval paths in ProcureAZ represent the different scenarios when particular users are asked to approve. Agency approval paths can be created and maintained in ProcureAZ by users with the role of Organization Administrator. If you are an Organization Administrator for more than one Organization, you can select which Organization to maintain by clicking the eyeglass lookup at the top of the screen.



Configure Approval Settings

Before establishing any approval paths, you'll first need to setup how approval paths will function for your agency. Upon logging into ProcureAZ with your unique Login ID and Password, click the **Configure Approval Settings** link from your Organization Administrator **Homepage**. Then select **Configure System Approval Settings**.



On the Add Approval Setting screen, first select which cascade setting will apply to your approvals. The cascade settings determine what options the user will have when submitting a document (e.g. Release, Bid, etc.) where multiple approval paths apply. The cascade options include the following:

- **No Cascading** – User will be able to select only one triggered approval path to apply to the document.
- **Non-Auto Cascading** – User will be able to select any or all triggered approval paths for the document.
- **Auto Cascading (Recommended)** – All triggered approval paths will be automatically applied to the document.

If any of your approval paths will be commodity based (e.g. IT equipment), select the checkbox next to **Allow NIGP Code Approval**. If any of your approval paths will be based on accounting (e.g. Comp Object), select the checkbox next to **Allow Account Code Segment Approval** and click **Save & Exit**.

Approval Path Management

Add Approval Setting

Organization: ADOA - Arizona Department of Administration

Cascade Setting:

Allow NIGP Code Approval:

Allow Account Code Segment Approval:

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Next, select the **Maintain Approval Type Sequence** link. This allows you to establish the types of approval paths you'll be setting up, and to give each type of approval a priority for use with the Cascading feature. When setting up your specific approval paths, you'll have to associate them with one of the approval types established here.

NOTE: You must setup at least one approval type, even if "No Cascading" was selected.

For each type of approval path you establish, you must supply an **Approval Type ID** or abbreviation, a **Description** (e.g. Department, Budget, IT) and a **Priority**. The priority will determine the order (from lowest to highest) the approval paths of this type will be triggered if one document triggers more than one approval path.

Maintain Organization Approval Types for: Arizona Department of Administration

Organization: ADOA - Arizona Department of Administration

Approval Type ID	Description	Priority	Status	Delete
new: <input type="text"/>	<input type="text"/>	<input type="text"/>	Active <input type="button" value="v"/>	<input type="checkbox"/>
DPT	Department	1	Active <input type="button" value="v"/>	<input type="checkbox"/>

You cannot delete an approval type if there is an approval path associated with it.
 Neither can you deactivate an approval type if there is an active approval path associated with it.

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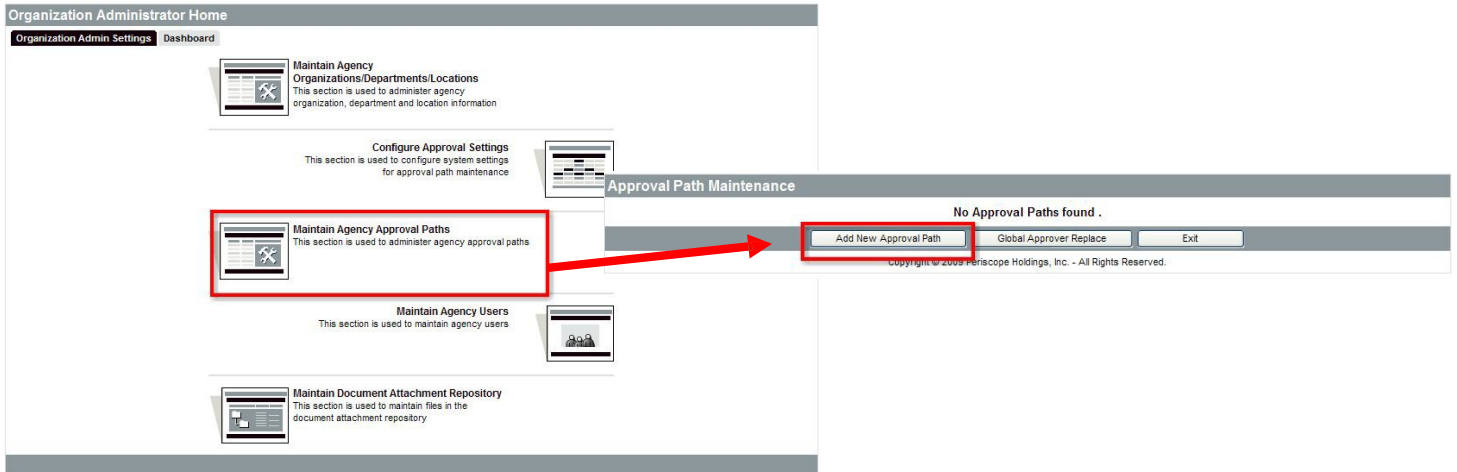
EXAMPLE: If Requisitions must go through Department-level approvals, then Budgeting approvals – setup "Department" and "Budget" as two approval types. Give the Department approval type a lower priority and the Budget approval type a higher priority.

Then, if your Operations Department submits a Requisition, and it triggers the Operations Department's internal approvals and the Budget approval path, if the Auto Cascading option was selected, the Requisition will automatically route to the specified Operations Department approvers, then to the Budget approvers.

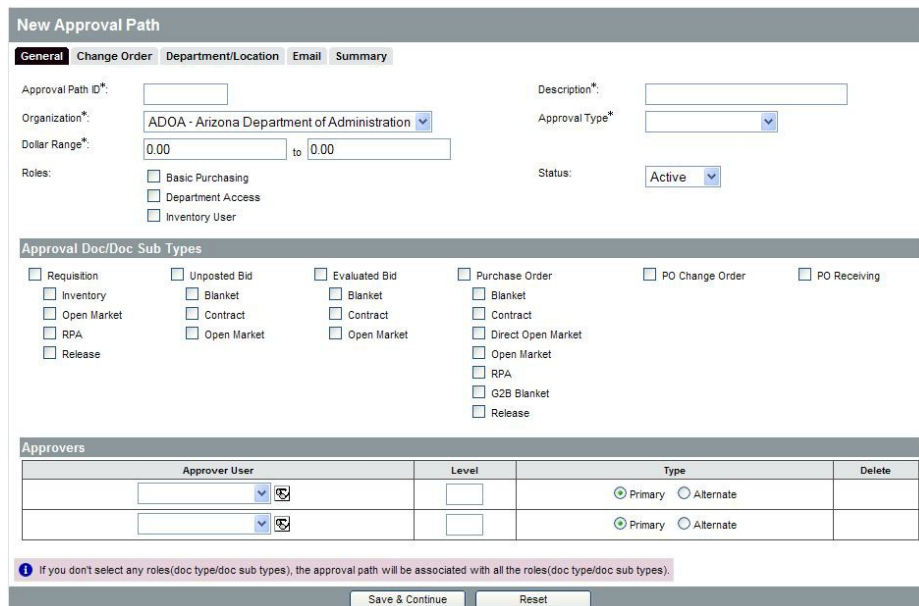
Adding Approval Paths

Once your Agency's approval settings have been established, including each of the necessary approval types, you are ready to create approval paths. Return to the Organization Administrator home screen and select the **Maintain Agency Approval Paths** link.

Approval Path Management



The **Approval Path Maintenance** screen will display any previously created approval paths and provide you the ability to edit them. To create a new approval path, select the **Add New Approval Path** button. To setup your new approval path, you must first complete the following fields:



The 'New Approval Path' form is divided into several sections:

- General:** Includes fields for 'Approval Path ID*', 'Description*', 'Organization*' (set to ADOA - Arizona Department of Administration), 'Dollar Range*' (0.00 to 0.00), 'Roles' (checkboxes for Basic Purchasing, Department Access, Inventory User), 'Approval Type*', and 'Status' (set to Active).
- Approval Doc/Doc Sub Types:** A grid of checkboxes for various document types such as Requisition, Inventory, Open Market, RPA, Release, Unposted Bid, Blanket, Contract, Open Market, Evaluated Bid, Blanket, Contract, Open Market, Purchase Order, PO Change Order, PO Receiving, Blanket, Contract, Direct Open Market, Open Market, RPA, G2B Blanket, and Release.
- Approvers:** A table with columns for 'Approver User', 'Level', 'Type', and 'Delete'. It shows two rows of approvers, each with a dropdown for the user, a level input field, and radio buttons for 'Primary' and 'Alternate'.

At the bottom, there is a note: 'If you don't select any roles(doc type/doc sub types), the approval path will be associated with all the roles(doc type/doc sub types).' and buttons for 'Save & Continue' and 'Reset'.

- **Approval Path ID** – Up to 10 character ID or abbreviation. Once saved, cannot be changed;
- **Description** – Name of the Approval Path (e.g. Operations Department Approval);
- **Approval Type** – Type of approval path (select from the list established on the **Maintain Approval Type Sequence** screen);
- **Dollar Range** – Dollar range for the total cost of the document that will trigger the path (you must put in a high dollar amount);
- **Roles** – ProcureAZ role types that the document will apply to;
- **Approval Doc/Doc Sub Types** – Document type(s) (e.g. Requisitions, Bids, etc.) that the approval path will apply to;
- **Approvers** – ProcureAZ users that will be asked to approve documents triggering this approval path;
- **Approver Level** – Order each approver will be asked to approve (from lowest to highest);
- **Approver Type** – At each level, ProcureAZ allows one Primary and one Alternate who will be simultaneously notified about documents triggering this path, and are both permitted to approve.

Approval Path Management

Once these required fields are complete, select **Save & Continue**. If the **Status** of the approval path is set to "Active," it can immediately be triggered by documents being submitted that match the criteria entered thus far.

Adding Approval Path Criteria

You can further configure the approval path as well as narrow the documents that will trigger this approval path by adding additional criteria from the tabs along the top of the approval path setup screen. These tabs include:

- **Change Order tab** – Set either the dollar increase or percentage increase to a Purchase Order that will trigger the approval path (only selectable if PO Change Order document selected for path)
- **Department/Location tab** – Set the approval path to trigger only for documents created by specific Departments and/or Locations
- **Email tab** – Configure whether email notifications will be sent to approvers, and if so, the format of the emails and any additional recipients
- **NIGP Code tab** – Set the approval path to trigger only for documents with specific commodities
- **Accounting tab** – Set the approval path to trigger only for documents with items charged to specific account segments (e.g. Comp Object)
- **Summary tab** – View all of the criteria entered for this path