

Approving a Document

Approval in ProcureAZ is the means by which identified approvers signify their approval or disapproval of a procurement document. Organization Administrators establish who can approve, under what circumstances each person approves, and in what order.

When a document is submitted for approval, ProcureAZ determines the users that must approve based on the criteria established by Organization Administrators, and notifies each approver via email once it is their turn to approve a document. Additional approvers may also be added manually by the user submitting a document, or any of that document's approvers.

Overview

You may be asked to approve various types of ProcureAZ documents. The table describes what you'll be approving when asked to approve each document type.

Document Type	Approval Question	Fields Available to Edit
Requisition	<u>Open Market and Release Requisitions</u> Should the purchase request be authorized? <u>RPA Requisitions</u> Should payment be authorized for an order that has already been placed?	<ul style="list-style-type: none"> Item Commodity Codes Accounting Information
Bid	<u>"Ready for Approval" Status</u> Should the solicitation be published? <u>"Evaluated" or "Opened" Status</u> Should the recommended solicitation award(s) be made?	<ul style="list-style-type: none"> Bidders List Attachments
Purchase Order	<u>Open Market and Release Purchase Orders</u> Should the purchase order be sent to the vendor and associated funds be encumbered? <u>Contract and (Master) Blanket Purchase Orders</u> Should the finalized contract be sent to the contractor and be made visible publicly?	<ul style="list-style-type: none"> Item Commodity Codes Accounting Information (if applicable)
Change Order	<u>Open Market and Release Purchase Orders</u> Should the change order be applied to the purchase order? <u>Contract and (Master) Blanket Purchase Orders</u> Should the amendment be applied to the contract?	<ul style="list-style-type: none"> Subcontractor Information (if applicable)
Receipt	Is the receipt information accurate?	<ul style="list-style-type: none"> None

Once any type of document is submitted for approval, it enters the "Ready for Approval" status. All documents in this status can be characterized as follows:

- Limited editing capability exists to ensure that a document is not materially changed during the approval process so that an approver isn't recorded as having approved a document with substantial changes they did not see.
- All triggered approvers must approve in the order specified by Organization Administrators before the document can be processed further. No approvers can be skipped.

If any approver disapproves, the document is returned to the creator. If re-submitted for approval, it must travel down the entire approval path that is triggered upon re-submittal.

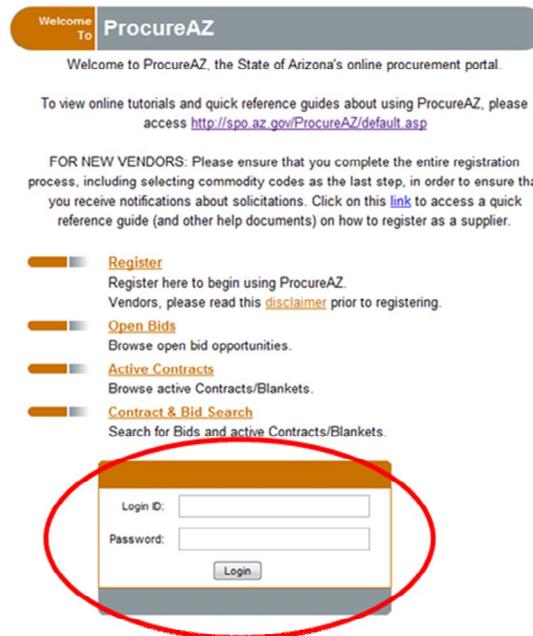
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Navigation

You'll be notified via email when a document requires your approval. The standard email message is displayed below. Note that the language that displays in the email is configurable by Organization Administrators from your agency.



Before you can review and approve a document, you must login to ProcureAZ. To login to ProcureAZ, input your email address into the "Login ID" field and the password you were given by an administrator into the **Password** field. Next, either hit **Enter** on your keyboard or click the **Login** button. Note that neither your login ID or password is case sensitive.



Once logged in, if you have access to multiple roles, ensure that either the Department Access or Basic Purchasing role is currently selected in order to enable you to approve a document. If you have been given only one role, you cannot choose another role and no role tabs will display.

Approving a Document



The quickest way to locate documents requiring your approval is via the Approval tab on the Homepage. The **Documents Pending My Approval** section on this tab lists all of the documents that have been submitted by other users that require your approval in order to proceed. Documents within this section are separated by document type. Selecting the document number link on the left side of the screen will open the document and allow you to review it, then decide whether to approve, disapprove or cancel the document.

Home - Welcome Back Chris Harris

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My Documents Pending Approval

Bid #	Description	Bid Opening Date	Approval Requested	Approver	Approval Status	Date Approved	Approval Type
ADES10-00000100	test	04/16/2010 03:00:00 PM	04/09/2010 11:30:25 AM	Chris Harris	Waiting...		Pre-bid

Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
ADSP010-00000155	11/23/2009	Carpeting	10	Open Market	System Administrator	ADSP0 / SPO	\$15,000.00
ADSP010-00000084	11/05/2009	Elevator Maintenance	10	RPA	Chris Harris	ABA / ABA	\$500.00

[List & Approve](#)

Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status
ADES10-00000100	test	Open Market	04/16/2010 03:00:00 PM	ADES / ADES	Cheryl Wynn	\$10.00	Ready for Approval

Reviewing a Document

Upon selecting any document, the Summary tab of the document will display. The Summary tab contains all of the information entered on the document. The Summary tab of all documents contains **Header Information** and **Item Information** sections. Depending on the type of document (Requisition, PO, etc.), other sections may also appear on the Summary tab. On the bottom of the Summary tab, the approval options will appear, allowing you to approve, disapprove, or cancel the document.

Approving a Document

Release Requisition ADSP010-00000122 Status: 1RGP - Gone to PO

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

Header Information

Requisition Number:	ADSP010-00000122	Short Description:	Envelopes	Status:	1RGP - Gone to PO
Department:	ADOA - Arizona Department of Administration	Location:	GAO - General Accounting Office	Required By Date:	
Entered Date:	11/12/2009	Requisition Type:	Release	Type Code:	
Requestor:	Angela Dillard	Purchaser:		Fiscal Year:	2010
Contact:	Angela Dillard	Contact Phone:	(555)555-1212	Alternate ID:	
Pcard Enabled:	Yes	Estimated Cost:	\$866.92	Print Format:	Requisition

Item Information

Approval Path:

Clone Requisition Print

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Providing Approval

Once you've finished your review, no matter what document type you are reviewing, you can view the approval path information for the document on the bottom of the Summary tab where you conducted your review. The **Approval Path** section displays all of the approvers that must review and approve the document for it to be processed forward and the order that they must approve it. If other approvers were asked to approve before you and approved the document, a date and time will appear in the **Date Approved/Disapproved** section in the row for that approver.

If you note that a person is not on the approval path that should review the document, you can add them by selecting their name in the dropdown box in the **Approver** column, assigning them an **Order Sequence**, and clicking **Add/Delete Approver**. Note that you will only be able to add approvers to the end of the existing approval path. If you would like to remove an approver you've added, you can click the check box in the **Delete** column and select **Add/Delete Approver**.

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disapproved/Canceled by	Comment View
	Karen Ingram	1	CONTRACT	1	Primary	09/29/2009 02:01:29 PM	11/18/2009 11:02:42 AM	Karen Ingram	
	Denel Pickering	2	CONTRACT	2	Primary	09/29/2009 02:01:29 PM			
<input type="checkbox"/>	Add New <input type="text"/>	<input type="text"/>			Primary				

Once you are ready to document your approval decision, view the **Approval Actions** section below the **Approval Path** section on the Summary tab of the document you are approving. If you choose to "Approve," this will trigger a notification to the next approver if there is one. If you are the last approver, the document will change status in order to allow for further processing. The user that can now process the document will be notified.

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Approval Actions	
Options	<input checked="" type="radio"/> Approve <input type="radio"/> Disapprove <input type="radio"/> Cancel Requisition
Comment	<input type="text"/>
<input type="button" value="Save & Exit"/>	