

## Approval Table Management

This document is a quick-reference guide for Agency Administrators who need to create purchase requisition approval rules and approval types in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at [app@azdoa.gov](mailto:app@azdoa.gov). Additional resources are also available on the SPO Website: <https://spo.az.gov/>.

The Approval Table Management process in APP determines the unique approval path that requisitions go through in order to be approved. Agency Administrators are able to edit and update approval types and approval rules.

- First, an **Approval Type** must be created. An approval type will be defined by the agency administrator. An approval type is to be customized per agency needs, so that approval rules can be grouped in order to create an approval pathway.
- Then, an **Approval Rule** will be created. The approval rule will dictate the workflow for each condition. An approval rule is the rule that links to the workflow for an approval type.

### Creating an Approval Type

1. From any page in APP, navigate to the **Procurement** drop-down and select **Manage Approval Types**.
2. From the Manage Approval Types page, select the **+** icon to create a new approval type.



3. A new row will appear in the grid.
4. Populate the following fields:
  - Agency: which agency this approval type is for
  - Approval Type: customize the type according to agency needs
  - Type Order: order of execution (lower numbers are executed before higher numbers)
  - Status: either "Valid" or "Deleted". *Please note, when changing status to Deleted, the type will delete.*
5. Select **Save**.

Now, you will be able to link approval rules to this approval type. If you want to edit this approval type, select the **Pencil** icon next to the line item.

## Creating an Approval Rule

1. From any page in APP, navigate to the **Procurement** drop-down and select **Manage Approval Rules**.
2. From the Manage Approval Rules page, select **Create New Approval Rule** to create a new approval rule.
3. A pop-up window will appear.

1. Populate the following fields:
  - Approval Type ID: select the approval type (previous exercise)
  - Location Scope: choose between Agency, Division, Department and Site
  - Requisition Type: rule will only apply to selected type
  - Lower Threshold (min \$0): rule will apply to requisitions above this amount
  - Upper Threshold (max \$999,999,999): rule will apply to requisitions below this amount
  - Rule Order: order of execution (lower before higher)
  - Status: valid or deleted. *Please note, when changing status to Deleted, the rule will delete.*
  - Approver(s): the approver or approvers you would like to link to this rule
2. Select **Save**.

Now, this approval rule is linked to the designated approval type. If you want to edit this approval type, select the **Pencil** icon next to the line item.