

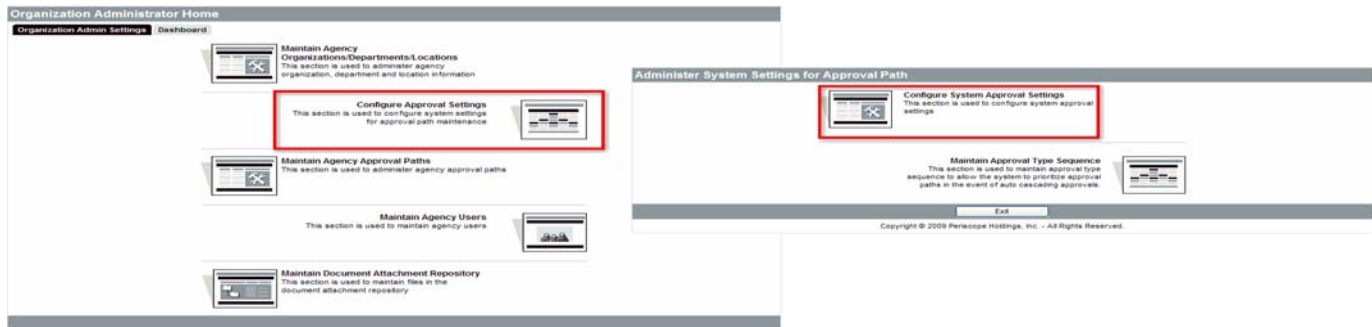
Creating Approval Paths

Agency approval paths can be created and maintained in Procure.AZ 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 Procure.AZ 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** – The User will be able to select only **one** applicable approval path. This option is generally chosen when few approval paths will be created.
- **Non-Auto Cascading** – The User will be able to select **any or all** approval paths that apply to this document.
- **Auto Cascading** – Documents will **automatically** be routed down all applicable approval paths. The user will be able to view the approval paths but will not be able to change them.

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



The screenshot shows the 'Add Approval Setting' form. It has the following fields:

- Organization: ADOA - Arizona Department of Administration
- Cascade Setting: A dropdown menu set to 'No Cascading'.
- Allow NIGP Code Approval: An unchecked checkbox.
- Allow Account Code Segment Approval: An unchecked checkbox.

 At the bottom, there are four buttons: 'Save & Exit', 'Save & Continue', 'Reset', and 'Cancel & Exit'. The footer text reads 'Copyright © 2009 Periscope Holdings, Inc. - All Rights Reserved.'

Creating Approval Paths

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 approval type a priority for use with the Cascading feature. When setting up your specific approval paths, you'll have to select one of the 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 the approval paths of this type will be triggered from lowest (first) to highest (last).

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"/>

i 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.

Save & Exit Save & Continue Reset Cancel & Exit

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EXAMPLE: If Release orders must go through Department-level approvals, then Budgeting approvals – setup "Department" and "Budget" as two approval types. Give the Department approval type a priority of "1" and the Budget approval type a priority of "2." Then, if a Department approval path and Budget approval path are both triggered by a Release order AND the Auto Cascading option was selected, the document will automatically route to the specified Department approvers, then to the Budget approvers.

Adding Approval Paths

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

Organization Administrator Home

Organization Admin Settings Dashboard

- Maintain Agency
Organizations/Departments/Locations
This section is used to administer agency organization, department and location information.
- Configure Approval Settings
This section is used to configure system settings for approval path maintenance.
- Maintain Agency Approval Paths**
This section is used to administer agency approval paths.
- Maintain Agency Users
This section is used to maintain agency users.
- Maintain Document Attachment Repository
This section is used to maintain files in the document attachment repository.

Approval Path Maintenance

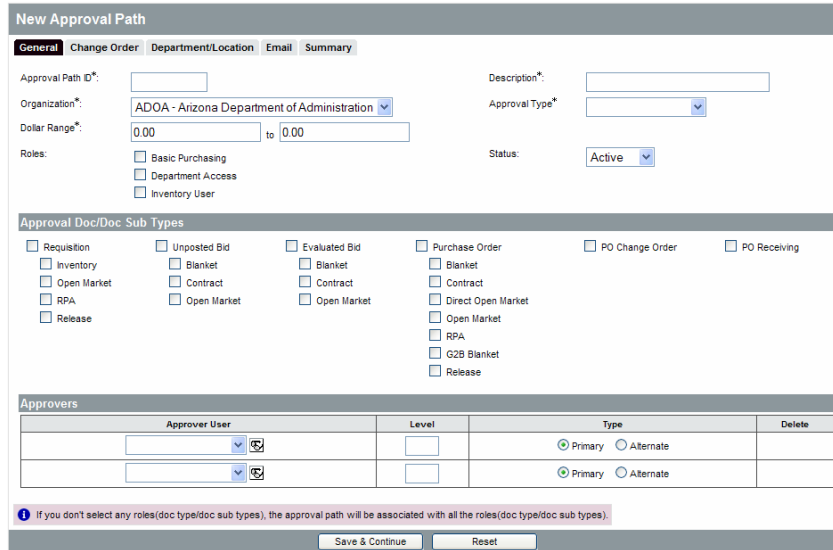
No Approval Paths found.

Add New Approval Path Global Approver Replace Exit

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Creating Approval Paths

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:



New Approval Path

General | Change Order | Department/Location | Email | Summary

Approval Path ID*:

Description*:

Organization*: ADOA - Arizona Department of Administration

Approval Type*:

Dollar Range*: 0.00 to 0.00

Status: Active

Roles:

- Basic Purchasing
- Department Access
- Inventory User

Approval Doc/Doc Sub Types

- Requisition
- Inventory
- Open Market
- RPA
- Release
- Unposted Bid
- Blanket
- Contract
- Open Market
- Evaluated Bid
- Blanket
- Contract
- Open Market
- Purchase Order
- Blanket
- Contract
- Direct Open Market
- Open Market
- RPA
- G2B Blanket
- Release
- PO Change Order
- PO Receiving

Approvers

Approver User	Level	Type	Delete
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	<input type="text"/>

! 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).

Save & Continue | Reset

- **Approval Path ID** – Up to 10 character ID. Once saved, cannot be changed
- **Description** – Name of the Approval Path
- **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
- **Roles** – Procure.AZ role types that the document will apply to
- **Approval Doc/Doc Sub Types** – Document type(s) (e.g. Releases, Bids, etc.) that the approval path will apply to
- **Approvers** – Procure.AZ 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, Procure.AZ allows one Primary and one Alternate who will be simultaneously notified about documents triggering this path

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 total or percentage change to a purchase order that will trigger the approval path (only selectable if the PO Change Order check box has been selected)
- **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
- **Summary tab** – View all of the criteria entered for this path