



Establish approval rules

Table of Contents

| | | |
|---------------------------------|-------|---|
| Establish approval rules | | i |
|---------------------------------|-------|---|

District Administration > Workflow > Approval Rules

This page is used to set up the account code rules for each approver in the approval path except the first approver. An approver may have multiple sets of approval rules. Approvers must be set up with an employee number in Security Administration.

Image

Workflow Type Click to select the Purchasing Requisition workflow.

Click to retrieve an approver.

| | |
|--|---|
| Amount From | Type the bypass dollar amount at which a requisition or request must be approved by the indicated approver. The amount must be entered as a whole dollar. |
| Amount To | Type the amount up to which the approver can approve. The amount must be entered as a whole dollar. |
| Approver opted out of email notifications | Select if the originator, first approver, or any approver does not want to receive e-mail notifications. |

Click **+Add**. An Include and Exclude row is added to the grid.

| | |
|----------------|---|
| Include | <p>Type the valid account code components to which the selected user has permission to approve.</p> <p>For each account code component, type a from and/or to account code component as needed, or with the cursor in the field, press F2. If you press F2, a list of available account code components is displayed. Select the account code component from the list.</p> <p>Click Cancel to return to the Approval Rules page.</p> |
|----------------|---|

| | |
|----------------|--|
| Exclude | Type the valid account code components to which the selected user does not have permission to approve. For each account code component, type a from and/or to account code component as needed, or with the cursor in the field, press F2. If you press F2, a list of available account code components is displayed. Select the account code component from the list. Click Cancel to return to the Approval Rules page. A complete mask should not be used as it will exclude all occurrences of that component. |
|----------------|--|

Each set of **Include/Exclude** rules are evaluated independently of any other rule sets that are created. Click **Validate All** to display a detailed list of account codes that are included in each rule set.

Click **Duplicate** to copy approval rules from other users and/or applications.

Click **Save**.

Click  to display the Approval Path page.