



# Approval Rules - DA4000



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# Approval Rules - DA4000

## District Administration > Workflow > Approval Rules

This page is used to set up the account codes 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.

### Add approval rules:

Field	Description
<b>Workflow Type</b>	<p>Click  to select a specific workflow type.</p> <ul style="list-style-type: none"> <li>• Warehouse Requisition</li> <li>• Restock Requisition</li> <li>• Budget Amendment Requests</li> <li>• Purchasing Requisition</li> <li>• Accounts Receivable</li> <li>• Travel Reimbursement</li> </ul> <p>Click  to view the <a href="#">approval path</a> for the selected workflow type.</p> <p><b>Note:</b> If <i>Purchasing Requisition</i> is selected, all employees who have Purchasing access and an employee number in Security Administration are included in the Approver Directory. However, the approval rules only apply to those employees in the approval path.</p>
<b>Approver</b>	<p>Click  to display the Approver Directory.</p> <p>Click <b>Retrieve</b>. A list of all users who are set up in Security Administration with an employee number are displayed.</p> <p>To search for a specific approver, type data in the desired search fields, and then click <b>Retrieve</b>. A list of available approvers that match the search criteria is displayed.</p> <p>Select an approver ID from the list.</p> <p>Click <b>Cancel</b> to return to the Approval Rules page without making a selection.</p>
<b>Amount From</b>	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.
<b>Amount To</b>	Type the amount up to which the approver can approve. The amount must be entered as a whole dollar.
<b>Approver opted out of email notifications</b>	Select if the originator, first approver, or any approver does not want to receive e-mail notifications.








Click **+Add** to add an Include and Exclude row.

<b>Include</b>	<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 <b>Cancel</b> to return to the Approval Rules page.</p>
<b>Exclude</b>	<p>Type the valid account code components to which the selected user does not have 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 <b>Cancel</b> to return to the Approval Rules page without making a selection.</p> <p>A complete mask should not be used as it will exclude all occurrences of that component.</p>

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 ruleset.

Click **Save**.

**Other functions and features:**

<b>Duplicate</b>	<p>Click to duplicate the approver accounts to another workflow type for the selected approver. The Duplicate window is displayed.</p> <table border="1" data-bbox="300 1272 1471 1601"> <tr> <td data-bbox="300 1272 587 1361"><b>From Workflow Type</b></td> <td data-bbox="587 1272 1471 1361">Click  to select the workflow type from which you want to duplicate information.</td> </tr> <tr> <td data-bbox="300 1361 587 1440"><b>From Approver</b></td> <td data-bbox="587 1361 1471 1440">The currently selected approver is displayed. This is the approver from which you are duplicating information.</td> </tr> <tr> <td data-bbox="300 1440 587 1518"><b>To Workflow Type</b></td> <td data-bbox="587 1440 1471 1518">The currently selected workflow type is displayed. This is the workflow type to which you are duplicating information.</td> </tr> <tr> <td data-bbox="300 1518 587 1601"><b>To Approver</b></td> <td data-bbox="587 1518 1471 1601">Click  to select an approver to which you want to duplicate the workflow.</td> </tr> </table> <p>Click <b>OK</b>. Otherwise, click <b>Cancel</b> to return to the Approval Rules page without making a selection.</p>	<b>From Workflow Type</b>	Click  to select the workflow type from which you want to duplicate information.	<b>From Approver</b>	The currently selected approver is displayed. This is the approver from which you are duplicating information.	<b>To Workflow Type</b>	The currently selected workflow type is displayed. This is the workflow type to which you are duplicating information.	<b>To Approver</b>	Click  to select an approver to which you want to duplicate the workflow.
<b>From Workflow Type</b>	Click  to select the workflow type from which you want to duplicate information.								
<b>From Approver</b>	The currently selected approver is displayed. This is the approver from which you are duplicating information.								
<b>To Workflow Type</b>	The currently selected workflow type is displayed. This is the workflow type to which you are duplicating information.								
<b>To Approver</b>	Click  to select an approver to which you want to duplicate the workflow.								
	<p>Click to validate each entered account code against the Chart of Accounts. <a href="#">Review the report.</a></p> <p>Click to display the User Accounts Validation Report. <a href="#">Review the report.</a></p>								
<b>Validate All</b>	<p>Click to validate all entered account codes against the Chart of Accounts and display a detailed list of account codes that are included in each rule set. <a href="#">Review the report.</a></p> <p>Click to display the User Accounts Validation Report. <a href="#">Review the report.</a></p>								
<b>Print</b>	<p>Click to print the Approval Rules report for the selected workflow type. <a href="#">Review the report.</a></p>								



Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.  
Click **Save**. A message is displayed asking if you want to delete the row. Click **OK**.  
Click **Cancel** to not delete the row.