

Establish approval rules

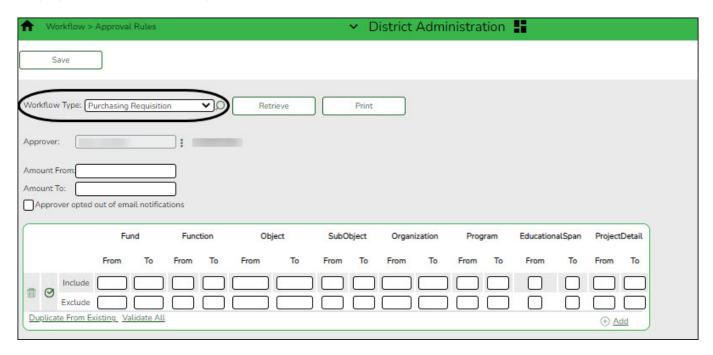
2025/12/05 23:52 i Establish approval rules

Table of Contents

Establish approval rules

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 have an employee number in Security Administration.



Workflow Type Click \checkmark to select the Purchasing Requisition workflow.

☐ Click if 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 email notifications.

☐ Click **+Add**. An Include and Exclude row are added.

Include Type the valid account code components to which the selected user has permission to approve.

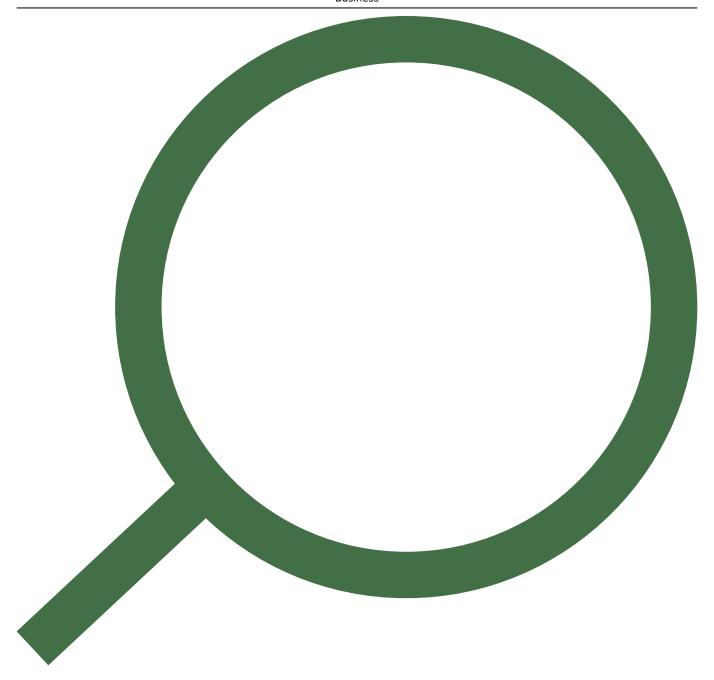
For each account code component, type a from and/or to account code component as needed, or with the cursor in the field, press F2. If you press F2, a list of available account code components is displayed. Select the account code component from the list.

Click **Cancel** to return to the Approval Rules page.

Business

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 ruleset.
☐ Click Duplicate to copy approval rules from other users and/or applications.
□ Click Save .
□ Click



to display the Approval Path page.



Back Cover