Ad-Hoc Approval

What is Ad-Hoc Approval?

Ad-Hoc approval allows approvers to add a requisition Ad-Hoc approver during the requisition approval workflow. This can be used for situations where a one-time approval is needed from an approver who is not in the regular approval workflow.

Department Approvers can send requisitions to other approvers for approval. When the requisition Ad-Hoc approver approves the requisition it continues to the next step in the approval workflow.
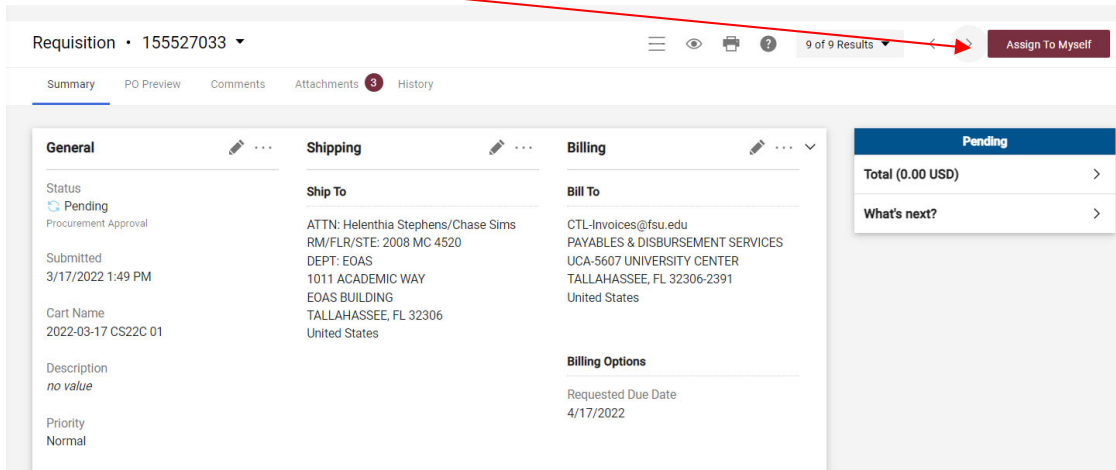
>Note: Adding a requisition Ad-Hoc approver to a requisition affects that requisition only and does not add them as approvers to any other requisitions.

While a requisition is assigned to a requisition Ad-Hoc approver, the requisition remains on the current workflow step, but an extra **Ad-Hoc** workflow step is displayed/inserted in the **PR Approvals** tab and shows the name of the Ad-Hoc approver.

How does it work?

During the requisition workflow approval process, the Ad-Hoc Approver field is visible on the General section of a requisition (located in the requisition summary tab) to requisition approvers.
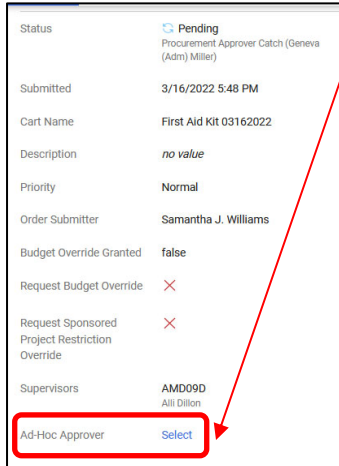
When a requisition has routed to you for approval, at the General section of the requisition, select "Assign to myself."

>Note: If the requisition has routed to you as an Ad-Hoc approver, you do not need to assign the requisition to yourself. Go directly to the General section of the requisition and click "Select" to add another Ad-Hoc approver to the requisition. This MUST be completed prior to approving the requisition. See below for more detail.
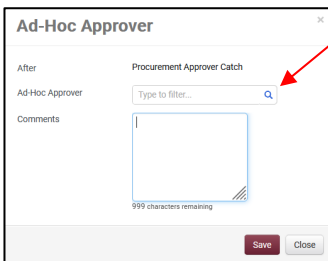
Ad-Hoc Approval

Go to the Ad-Hoc Approver on the General section of the requisition and click "Select" to add an Ad-Hoc approver to the requisition:
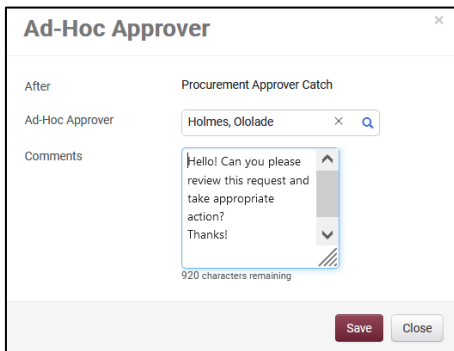
Search for an Ad-Hoc approver, add comments, and then click "Save":
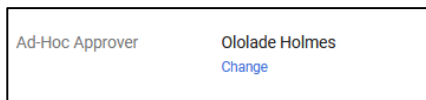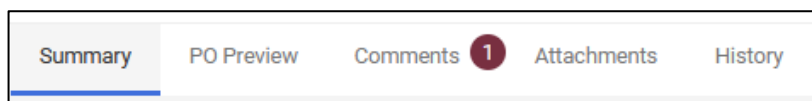
Notice: Once a requisition Ad-Hoc approver is selected, their name is displayed next to the Ad-Hoc Approver field in the General section of the requisition, replacing the Select link. Comments are displayed in the Comments section of the requisition.

Ad-Hoc Approval

The Ad-Hoc approver can be changed or deleted as long as the requisition has not been approved and is still assigned to the person who added the Ad-Hoc approver.

To delete an assigned Ad-Hoc Approver, simply click on "Change" next to the Hoc Approver field in the General section of the requisition:

Click on the "X" and then click "Save"

The assigned Ad-Hoc Approver is now removed and replaced with "Select"

Ad-Hoc Approval

When the current approver completes the step they are in, the requisition is automatically assigned to the Ad-Hoc approver. The requisition remains on the current workflow step, but an extra Ad-Hoc workflow step is added to the workflow. It can be seen in the PR Approvals section and shows the name of the Ad-Hoc approver.
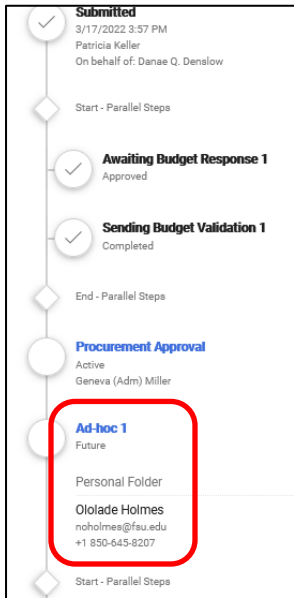
Click "Approve" or you can select one of the other options.

The request is now waiting for the Ad-Hoc approver to review and take action (Active):

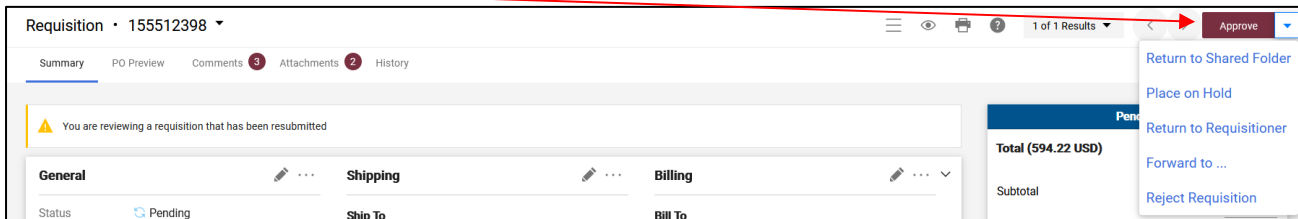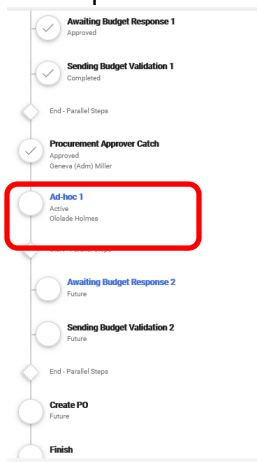The requisition Ad-Hoc approvers access the requisition from their Approval folders, as they normally do. They review the requisition and can perform regular approval tasks. They can also assign a substitute Ad-Hoc approver by clicking on the Select link next to the Ad-Hoc Approver field on the General section of the requisition. As soon as the Ad-Hoc approver approves the requisition, it continues to the next workflow step.

Ad-Hoc Approval

Once all Workflow steps are approved, a PO will automatically be created by the system.
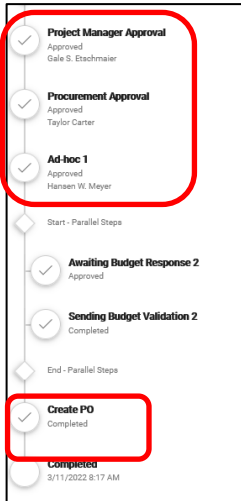
Ad-Hoc Approval PROS and CONS

1. Users who have permission to approve or reject requisitions are available for selection as Ad-Hoc approvers.

   Pros: Departments can add any approvers to their requisition approval process.
   Cons: Can not restrict to a select group of available Ad-Hoc approvers.

2. Only one requisition Ad-Hoc approver can be selected on a workflow step.

   Pros: Dedicated approver.
   Cons: If the assigned Ad-Hoc approver is not available, the request must be unassigned before it can be re-assigned to another Ad-Hoc approver.

3. Approvers cannot select themselves as the requisition Ad-Hoc approver.

   Pros: N/A
   Cons: N/A

4. Requesters can not be part of the Ad-Hoc approvers.

   Pros: Separation of duty.
   Cons: N/A

5. There is no limit on how many Ad-Hoc Approvers can be added to a requisition workflow.

   Pros: Flexibility.
   Cons: The more Ad-Hoc Approver levels added to a requisition workflow, the longer the approval process will take to complete.