

# 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.

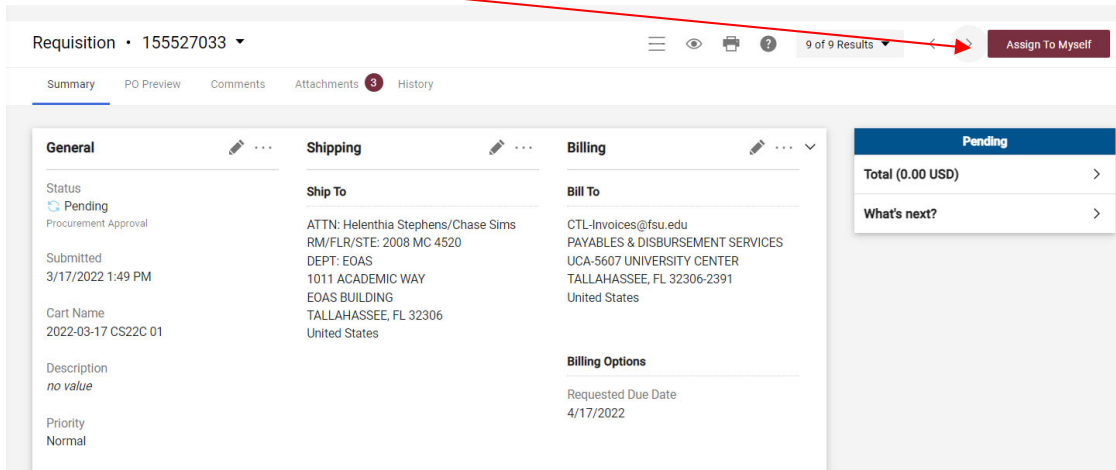
Note: Adding a requisition Ad-Hoc approver to a requisition affects that requisition only and does not add them as approvers to any other requisitions.

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.

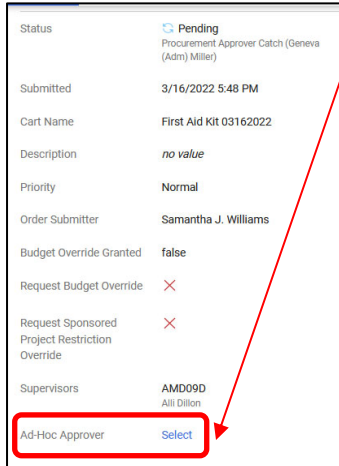
When a requisition has routed to you for approval, at the General section of the requisition, select “Assign to myself.”



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

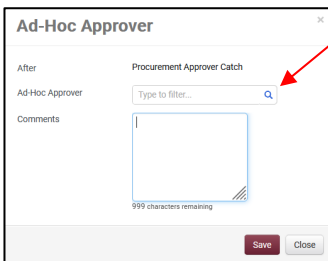
Go to the Ad-Hoc Approver on the General section of the requisition and click "Select" to add an Ad-Hoc approver to the requisition:



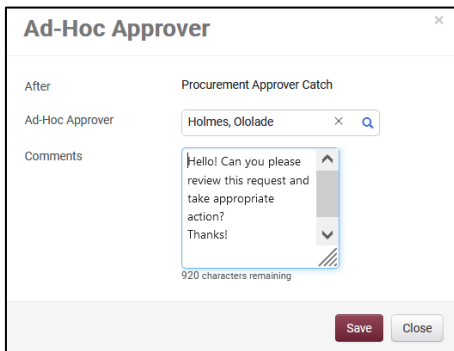
A screenshot of a requisition details page. The 'Ad-Hoc Approver' field is highlighted with a red box, and a red arrow points to the 'Select' button next to it. The requisition status is 'Pending'.

Status	Pending Procurement Approver Catch (Geneva (Admin) Miller)
Submitted	3/16/2022 5:48 PM
Cart Name	First Aid Kit 03162022
Description	no value
Priority	Normal
Order Submitter	Samantha J. Williams
Budget Override Granted	false
Request Budget Override	×
Request Sponsored Project Restriction Override	×
Supervisors	AMD09D Alli Dillon
Ad-Hoc Approver	Select

Search for an Ad-Hoc approver, add comments, and then click "Save":

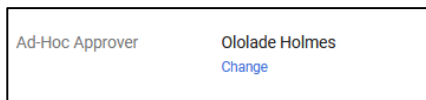


A screenshot of the 'Ad-Hoc Approver' dialog box. The 'Ad-Hoc Approver' field contains a search input with the placeholder text 'Type to filter...'. A red arrow points to the search icon. The 'Comments' field is empty. The dialog has 'Save' and 'Close' buttons at the bottom.

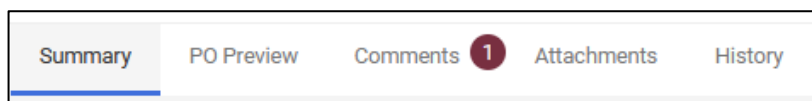


A screenshot of the 'Ad-Hoc Approver' dialog box. The 'Ad-Hoc Approver' field now displays 'Holmes, Ololade'. The 'Comments' field contains the text: 'Hello! Can you please review this request and take appropriate action? Thanks!'. The dialog has 'Save' and 'Close' buttons at the bottom.

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.



A screenshot of the requisition details page showing the 'Ad-Hoc Approver' field. The field now displays 'Ololade Holmes' with a 'Change' link below it.



A screenshot of the requisition navigation tabs. The tabs are: Summary, PO Preview, Comments (with a red circle containing the number 1), Attachments, and History.

# 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:

Requisition 155493101

Status: Pending (Procurement Approver Catch (Geneva (Adm) Miller))

Submitted: 3/16/2022 5:48 PM

Cart Name: First Aid Kit 03162022

Description: no value

Priority: Normal

Order Submitter: Samantha J. Williams

Budget Override Granted: false

Request Budget Override: X

Request Sponsored Project Restriction Override: X

Supervisors: AMD09D

Ad-Hoc Approver: Ololade Holmes **Change**

Ad-Hoc Approver: Ololade Holmes **Change**

Click on the “X” and then click “Save”

Ad-Hoc Step: Ad-hoc 1

Ad-Hoc Approver: Holmes, Ololade **X**

Comments: Hello! Can you please

Ad-Hoc Step: Ad-hoc 1

Ad-Hoc Approver: Type to filter...

Comments: 1000 characters remaining

**Save** Close

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

Status: Pending (Procurement Approver Catch (Geneva (Adm) Miller))

Submitted: 3/16/2022 5:48 PM

Cart Name: First Aid Kit 03162022

Description: no value

Priority: Normal

Order Submitter: Samantha J. Williams

Budget Override Granted: false

Request Budget Override: X

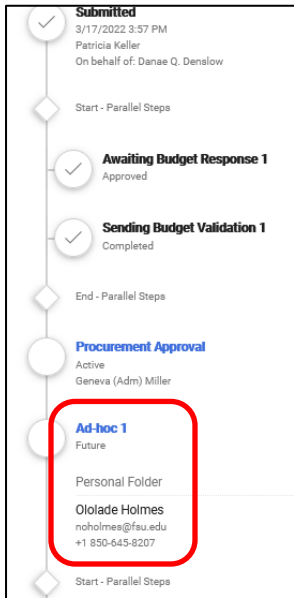
Request Sponsored Project Restriction Override: X

Supervisors: AMD09D (Alli Dillon)

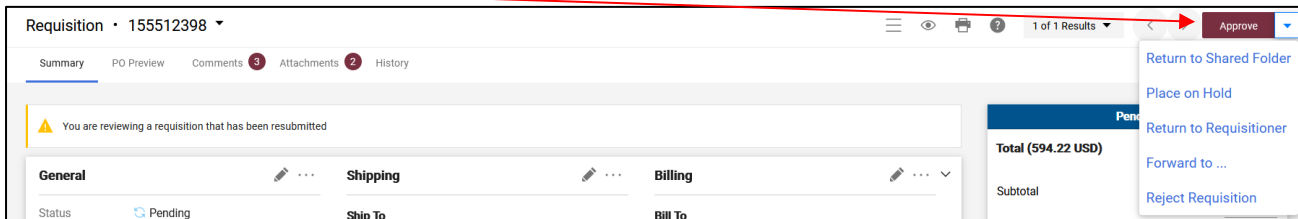
Ad-Hoc Approver: **Select**

# Ad-Hoc Approval

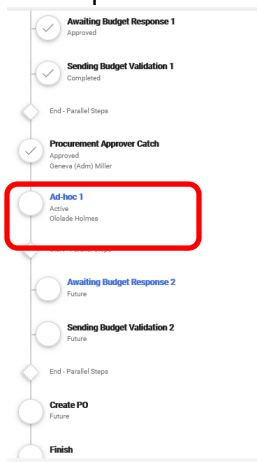
When the current approver completes the step they are in, the requisition is automatically assigned to the Ad-Hoc approver. The requisition remains on the current workflow step, but an extra Ad-Hoc workflow step is added to the workflow. It can be seen in the PR Approvals section and shows the name of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



Click “Approve” or you can select one of the other options.



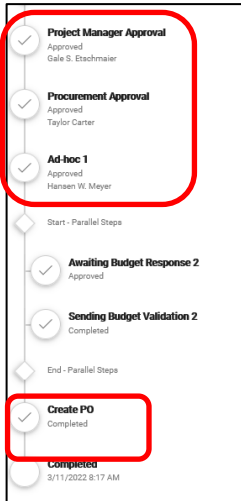
The request is now waiting for the Ad-Hoc approver to review and take action (Active):



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.