

New SpearMart Feature - 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.

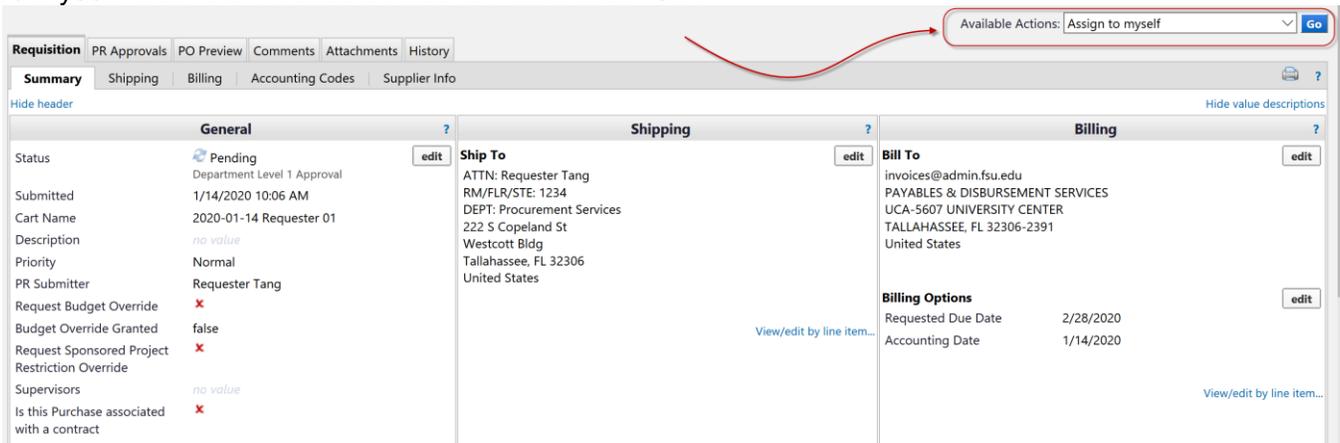
Note: Adding a requisition Ad-Hoc approver to a requisition affects that requisition only and does not add them as approvers to any other requisitions.

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” from the “Available Actions:” then click “Go”:

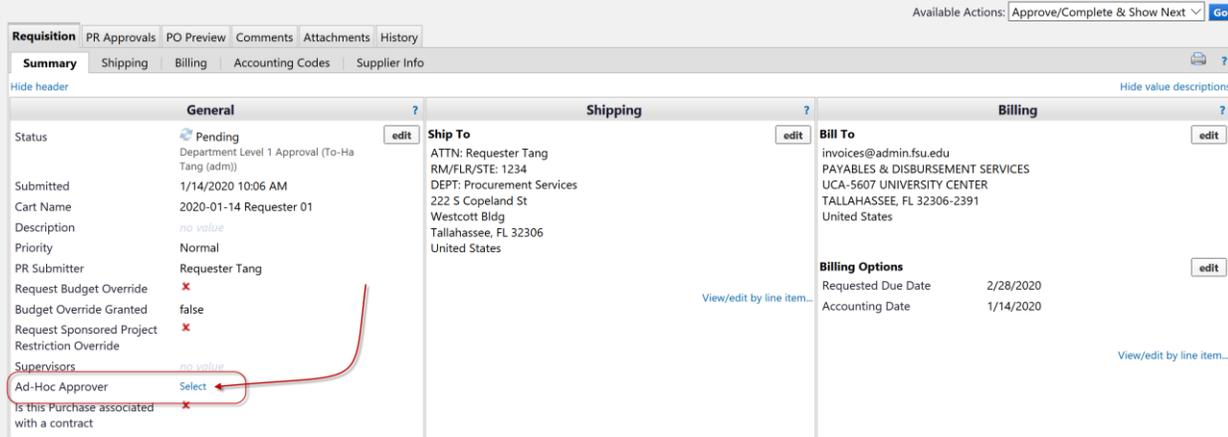


The screenshot shows the SpearMart requisition summary page. At the top, there are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. Below these is a sub-tabbed header with 'Summary', 'Shipping', 'Billing', 'Accounting Codes', and 'Supplier Info'. The main content area is divided into three sections: 'General', 'Shipping', and 'Billing'. The 'General' section shows the status as 'Pending' and includes fields for 'Submitted', 'Cart Name', 'Description', 'Priority', 'PR Submitter', 'Request Budget Override', 'Budget Override Granted', 'Request Sponsored Project', 'Restriction Override', 'Supervisors', and 'Is this Purchase associated with a contract'. The 'Shipping' section shows 'Ship To' information including 'ATTN: Requester Tang', 'RM/FLR/STE: 1234', 'DEPT: Procurement Services', '222 S Copeland St', 'Westcott Bldg', 'Tallahassee, FL 32306', and 'United States'. The 'Billing' section shows 'Bill To' information including 'invoices@admin.fsu.edu', 'PAYABLES & DISBURSEMENT SERVICES', 'UCA-5607 UNIVERSITY CENTER', 'TALLAHASSEE, FL 32306-2391', and 'United States'. At the top right of the main content area, there is a dropdown menu labeled 'Available Actions:' with 'Assign to myself' selected and a 'Go' button next to it. A red arrow points from the text above to this dropdown menu.

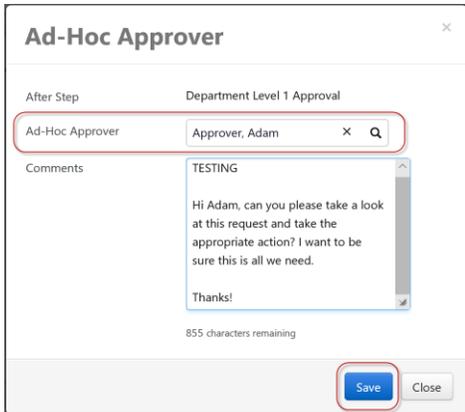
Note: If the requisition has routed to you as an Ad-Hoc approver, you do not need to assign the requisition to yourself. Go directly to the General section of the requisition and click “Select” to add another Ad-Hoc approver to the requisition. This **MUST** be completed prior to approving the requisition.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

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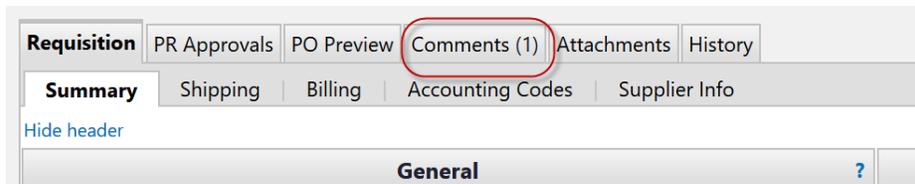
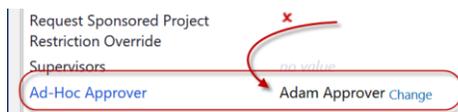
Go to the Ad-Hoc Approver on the General section of the requisition and click "Select" to add an Ad-Hoc approver to the requisition:



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.



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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:

The screenshot shows the 'General' section of a requisition form. The 'Ad-Hoc Approver' field is highlighted with a red circle and contains the text 'Adam Approver Change'. Other fields include Status (Pending), Submitted (1/14/2020 10:06 AM), Cart Name (2020-01-14 Requester 01), and various override options. The 'Supervisors' field is set to 'no value'.

A close-up of the 'Ad-Hoc Approver' field. It shows a red 'X' icon next to the text 'Adam Approver Change'. The field is highlighted with a red circle, and a red arrow points to the 'X' icon.

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

Ad-Hoc Approver

The 'Ad-Hoc Approver' dialog box is shown. The 'Ad-Hoc Approver' field contains the text 'Approver, Adam' and has a red circle around the 'X' icon. The 'Ad-Hoc Step' is 'Ad-hoc 1' and there is a 'Comments' field.

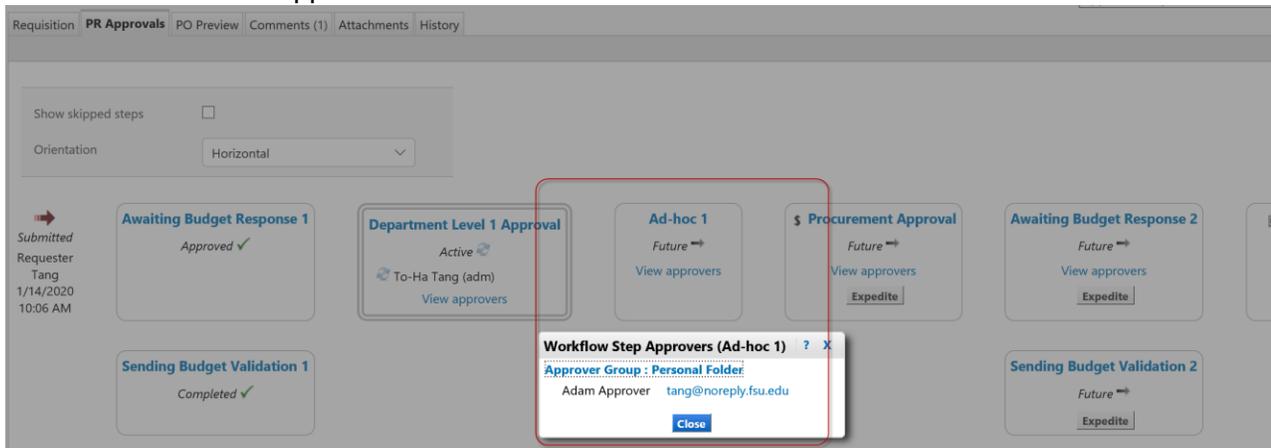
The 'Ad-Hoc Approver' dialog box is shown. The 'Ad-Hoc Approver' field contains the text 'Type to filter...' and has a search icon. The 'Ad-Hoc Step' is 'Ad-hoc 1' and there is a 'Comments' field. The 'Save' button is highlighted with a red circle.

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

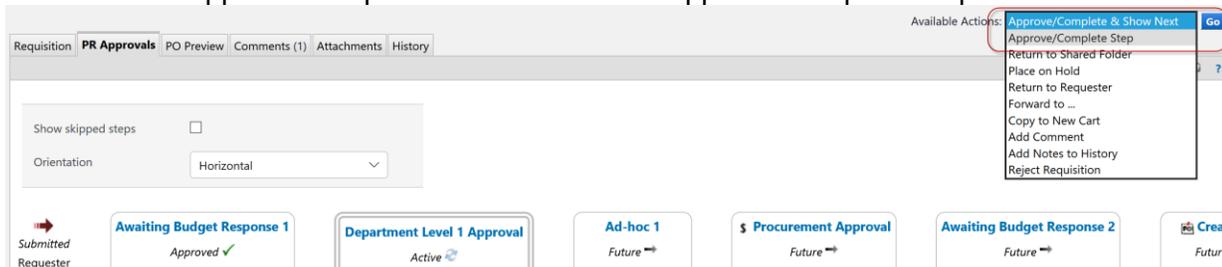
The screenshot shows the 'General' section of a requisition form. The 'Ad-Hoc Approver' field is highlighted with a red circle and contains the text 'Select'. Other fields include Status (Pending), Submitted (1/14/2020 12:09 PM), Cart Name (2020-01-14 user06 01), and various override options. The 'Supervisors' field is set to 'no value'.

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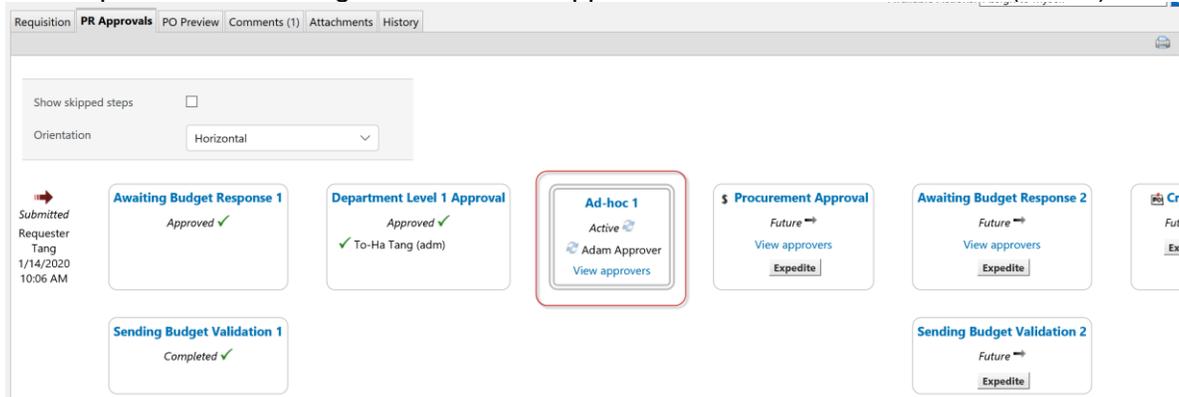
When the current approver completes the step they are in, the requisition is automatically assigned to the Ad-Hoc approver. The requisition remains on the current workflow step, but an extra Ad-Hoc workflow step is added to the workflow. It can be seen in the PR Approvals section and shows the name of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



Select either “Approve/Complete & Show Next” or “Approve/Complete Step” then click “Go”:



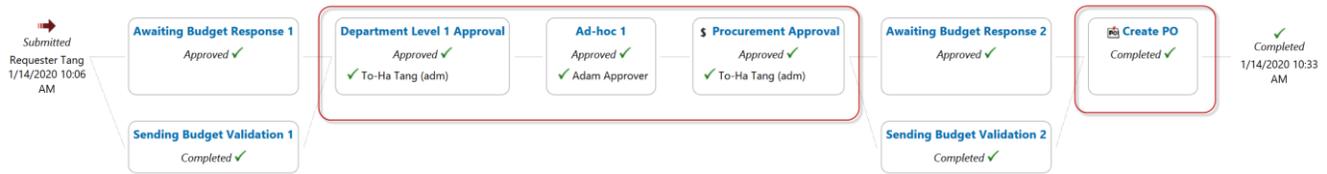
The request is now waiting for the Ad-Hoc approver to review and take action (Active):



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.

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Once all Workflow steps are approved (green check marks), 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.