

# 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 displays the SpearMart requisition workflow interface. At the top, there is a navigation bar with tabs: Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. Below this is a sub-navigation bar with tabs: Summary, Shipping, Billing, Accounting Codes, and Supplier Info. The 'Summary' tab is active, and the 'General' section is expanded. In the 'General' section, the 'Status' is 'Pending' with a sub-status 'Department Level 1 Approval'. The 'Submitted' date is '1/14/2020 10:06 AM'. The 'Cart Name' is '2020-01-14 Requester 01'. The 'Description' is 'no value'. The 'Priority' is 'Normal'. The 'PR Submitter' is 'Requester Tang'. The 'Request Budget Override' is 'false'. The 'Budget Override Granted' is 'false'. The 'Request Sponsored Project' is 'false'. The 'Restriction Override' is 'no value'. The 'Supervisors' are 'no value'. The 'Is this Purchase associated with a contract' is 'false'. In the 'Shipping' section, the 'Ship To' address is 'ATTN: Requester Tang, RM/FLR/STE: 1234, DEPT: Procurement Services, 222 S Copeland St, Westcott Bldg, Tallahassee, FL 32306, United States'. In the 'Billing' section, the 'Bill To' address is 'invoices@admin.fsu.edu, PAYABLES & DISBURSEMENT SERVICES, UCA-5607 UNIVERSITY CENTER, TALLAHASSEE, FL 32306-2391, United States'. The 'Billing Options' section shows 'Requested Due Date' as '2/28/2020' and 'Accounting Date' as '1/14/2020'. At the top right of the 'General' section, there is a dropdown menu labeled 'Available Actions:' with 'Assign to myself' selected. A red arrow points from the text 'select “Assign to myself” from the “Available Actions:”' to this dropdown menu. A 'Go' button is next to the 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.

# New SpearMart Feature - 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:

The screenshot shows the SpearMart requisition form with the General section selected. The Ad-Hoc Approver field is highlighted with a red circle, and a red arrow points to the 'Select' link next to it. The form includes tabs for Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. The Summary tab is active, showing fields for Status, Submitted, Cart Name, Description, Priority, PR Submitter, Request Budget Override, Budget Override Granted, Request Sponsored Project, Restriction Override, Supervisors, and Ad-Hoc Approver. The Shipping and Billing sections are also visible.

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

The screenshot shows the Ad-Hoc Approver dialog box. The Ad-Hoc Approver field is highlighted with a red circle, and a red arrow points to the search icon. The dialog box includes fields for After Step, Ad-Hoc Approver, and Comments. The Comments field has a character count of 1000 characters remaining.

The screenshot shows the Ad-Hoc Approver dialog box. The Ad-Hoc Approver field is highlighted with a red circle, and a red arrow points to the search icon. The Comments field contains the text: "TESTING Hi Adam, can you please take a look at this request and take the appropriate action? I want to be sure this is all we need. Thanks!". The dialog box includes fields for After Step, Ad-Hoc Approver, and Comments. The Comments field has a character count of 855 characters remaining.

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.

The screenshot shows the SpearMart requisition form with the General section selected. The Ad-Hoc Approver field is highlighted with a red circle, and a red arrow points to the 'Adam Approver Change' link. The form includes tabs for Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. The Summary tab is active, showing fields for Status, Submitted, Cart Name, Description, Priority, PR Submitter, Request Budget Override, Budget Override Granted, Request Sponsored Project, Restriction Override, Supervisors, and Ad-Hoc Approver.

The screenshot shows the SpearMart requisition form with the Comments section selected. The Comments (1) tab is highlighted with a red circle. The form includes tabs for Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. The Summary tab is active, showing fields for Status, Submitted, Cart Name, Description, Priority, PR Submitter, Request Budget Override, Budget Override Granted, Request Sponsored Project, Restriction Override, Supervisors, and Ad-Hoc Approver.

# New SpearMart Feature - 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:

The screenshot shows the 'Requisition' form with tabs for Summary, Shipping, Billing, Accounting Codes, and Supplier Info. The 'General' tab is active. In the 'Supervisors' section, the 'Ad-Hoc Approver' field is circled in red, and a red arrow points to the 'Change' link next to it. The 'Ad-Hoc Approver' field is currently set to 'Adam Approver'.

General	Shipping	Billing
<b>Status</b> Pending Department Level 1 Approval (To-Ha Tang (adm)) <b>Submitted</b> 1/14/2020 10:06 AM <b>Cart Name</b> 2020-01-14 Requester 01 <b>Description</b> no value <b>Priority</b> Normal <b>PR Submitter</b> Requester Tang <b>Request Budget Override</b> X <b>Budget Override Granted</b> false <b>Request Sponsored Project Restriction Override</b> X <b>Supervisors</b> no value <b>Ad-Hoc Approver</b> Adam Approver <a href="#">Change</a> <b>Is this Purchase associated with a contract</b> X	<b>Ship To</b> ATTN: Requester Tang RM/FLR/STE: 1234 DEPT: Procurement Services 222 S Copeland St Westcott Bldg Tallahassee, FL 32306 United States  <b>View/edit by line item...</b>	<b>Bill To</b> invoices@admin.fsu.edu PAYABLES & DISBURSEMENT SERVICES UCA-5607 UNIVERSITY CENTER TALLAHASSEE, FL 32306-2391 United States  <b>Billing Options</b> <b>Requested Due Date</b> 2/28/2020 <b>Accounting Date</b> 1/14/2020  <b>View/edit by line item...</b>

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

## Ad-Hoc Approver

The 'Ad-Hoc Approver' dialog box is shown. It has fields for 'Ad-Hoc Step', 'Ad-Hoc Approver', and 'Comments'. The 'Ad-Hoc Approver' field is circled in red, and a red arrow points to the 'X' button next to it. The 'Save' button is also circled in red.

Ad-Hoc Step: Ad-hoc 1

Ad-Hoc Approver: Approver, Adam X Q

Comments: [Text Area]

1000 characters remaining

Save Close

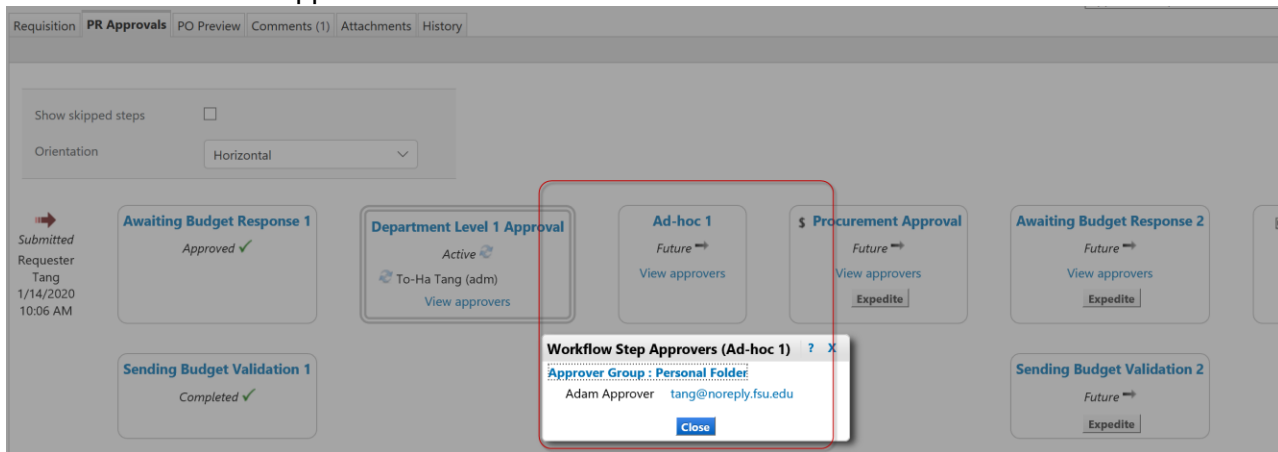
The assigned Ad-Hoc Approver is now removed and replaced with “Select”

The screenshot shows the 'Requisition' form with the 'General' tab active. In the 'Supervisors' section, the 'Ad-Hoc Approver' field is now set to 'Select'.

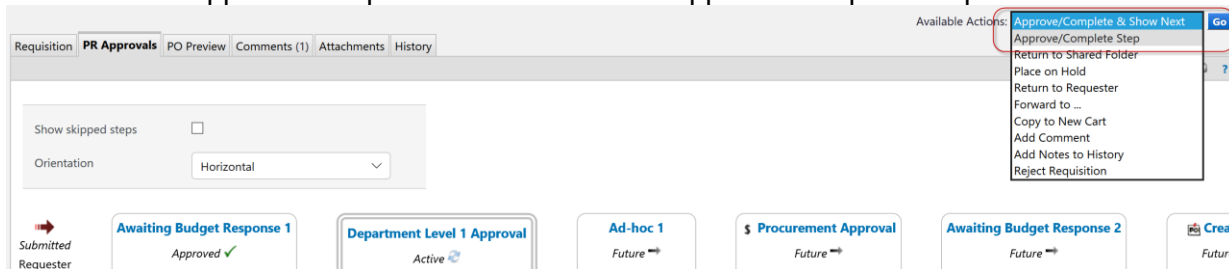
General
<b>Status</b> Pending Department Level 1 Approval (To-Ha Tang (adm)) <b>Submitted</b> 1/14/2020 12:09 PM <b>Cart Name</b> 2020-01-14 user06 01 <b>Description</b> no value <b>Priority</b> Normal <b>PR Submitter</b> Joe User6 <b>Request Budget Override</b> X <b>Budget Override Granted</b> false <b>Request Sponsored Project Restriction Override</b> X <b>Supervisors</b> no value <b>Ad-Hoc Approver</b> Select <b>Is this Purchase associated with a contract</b> X

# New SpearMart Feature - Ad-Hoc Approval

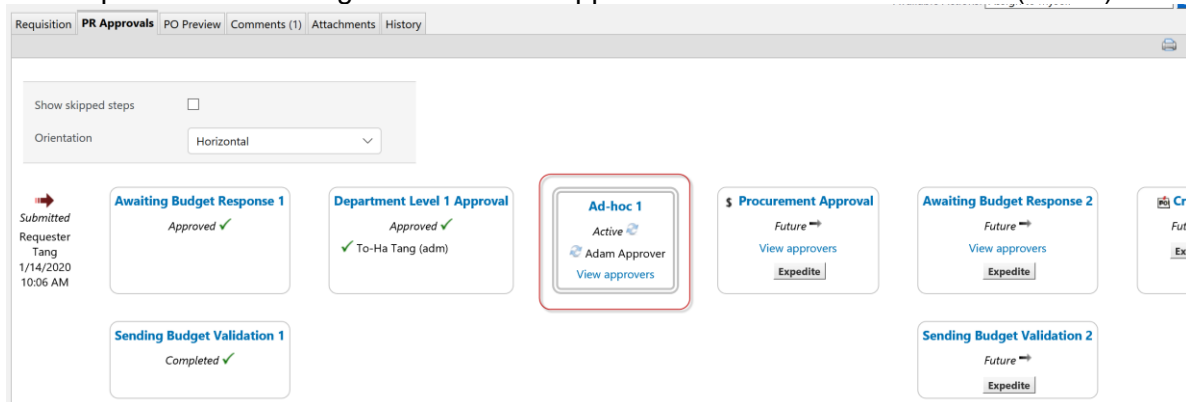
When the current approver completes the step they are in, the requisition is automatically assigned to the Ad-Hoc approver. The requisition remains on the current workflow step, but an extra Ad-Hoc workflow step is added to the workflow. It can be seen in the PR Approvals section and shows the name of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



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



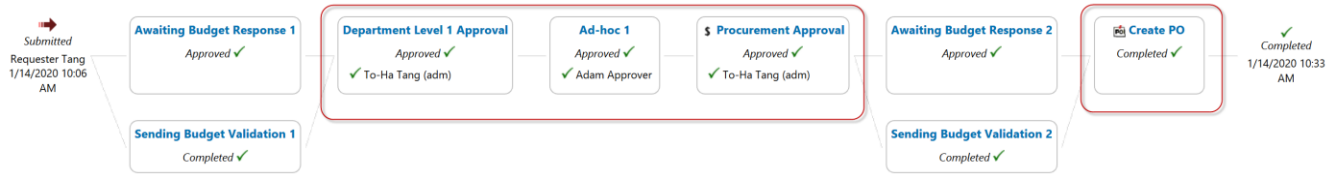
The request is now waiting for the Ad-Hoc approver to review and take action (Active):



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.

# New SpearMart Feature - Ad-Hoc Approval

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.