

PO.020.170 – ADDING AD HOC APPROVERS TO WORKFLOW

Purpose	To use ad hoc routing to add Approvers to purchase orders.
Description	<p>Adding approvers or reviewers to a Purchase Order who are outside of the workflow process design is called ad hoc approval, and it only applies to the approval instance in which the addition occurs. Ad Hoc approvers can be added to a Purchase Order by a Buyer or an Approver.</p> <p>Ad hoc approvers are required to approve the Purchase Order line.</p>
Security Role	BOR_PO_APPROVE
Dependencies/ Constraints	<p>The Purchase Order must have a status of “Pending Approval” to be available for approval.</p> <p>To be added as an ad hoc approver, the user must have the BOR_AD_HOC_APPROVER role.</p>
Additional Information	<p>For more information about approving a purchase order, see PO.020.160 - Approving a PO.</p> <p>Every purchase order will route to the Buyer approval level. The Asset and Budget Reference approval levels are triggered when certain information is added to the purchase order and needs further review. For more information, see the Purchasing Workflow Approval job aid.</p> <p>Once an ad hoc approver or reviewer is added to a transaction approval path, any information s/he adds cannot be edited. However, they can be deleted from that approval path and added again if needed. Once approval changes are applied, they can only be deleted from the approval chain by the approver before them.</p>

Procedure

Below are step by step instructions on how to add ad hoc approvers to a purchase order approval workflow as a Buyer.

Step	Action
1.	Click the NavBar icon
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Add/Update POs link.
6.	Proceed with creating a Purchase Order. Save the Purchase Order.
7.	On the Maintain Purchase Order page, Click the View Approvals/Purchase Order Approval link. The Purchase Order Approval page displays.
8.	Click the green plus (+) sign on the workflow level on which an ad hoc approver need to be added, to insert an Approver. The system opens up a new window.
9.	Enter or search for the User ID of the person to add as an ad hoc approver.
10.	On the Insert as option section, verify the Approver option is checked.
11.	Click Insert .
12.	Click the Apply Approval Changes button.
13.	The Approver is now inserted as an ad hoc Approver. Repeat as many times as necessary to add multiple ad hoc Approvers.

Below are step by step instructions on how to add ad hoc approvers to approval workflow as an Approver from the Worklist.

Step	Action
1.	Click the NavBar icon
2.	Click the Menu icon.
3.	Click the Worklist link.
4.	Click the My Worklist-Summary View or My Worklist-Detail View link.
5.	Select the PO ID link and the system will navigate to the Purchase Order Approvals page.
6.	Click the green plus (+) sign on the workflow level on which an ad hoc approver need to be added, to insert an Approver. The system opens up a new window.

Step	Action
7.	Enter or search for the User ID of the person to add as an ad hoc approver.
8.	On the Insert as option section, verify the Approver option is checked.
9.	Click Insert .
10.	Click the Apply Approval Changes button.
11.	The Approver is now inserted as an ad hoc Approver. Repeat as many times as necessary to add multiple ad hoc Approvers.

Below are step by step instructions on how to add ad hoc approvers to approval workflow as an Approver from the Approve POs link.

Step	Action
1.	Click the NavBar icon
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Approve POs link.
6.	Verify the system populates the correct business unit in the Business Unit field.
7.	Verify the system populates 'Pending' in the Approval Status dropdown.
8.	Enter any additional criteria to narrow the search results.
9.	Click Search to find all POs and PO lines awaiting approval.
10.	Select the PO ID link and the system will navigate to the Purchase Order Approvals page.
11.	Navigate to the Approval Workflow.
12.	Click the green plus (+) sign on the workflow level on which an ad hoc approver need to be added, to insert an Approver. The system opens up a new window.
13.	Enter or search for the User ID of the person to add as an ad hoc approver.
14.	On the Insert as option section, verify the Approver option is checked.
15.	Click Insert .
16.	Click the Apply Approval Changes button.
17.	The Approver is now inserted as an ad hoc Approver. Repeat as many times as necessary to add multiple ad hoc Approvers.

Below are step by step instructions on how to remove ad hoc approvers from approval workflow. Beginning at step 11, the steps are the same to remove an ad hoc approver from all navigations shown in the sections above.

Step	Action
1.	Click the NavBar icon
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Approve POs link.
6.	Verify the system populates the correct business unit in the Business Unit field.
7.	Verify the system populates ' Pending ' in the Approval Status dropdown.
8.	Enter any additional criteria to narrow down the search results.
9.	Click Search to find all POs and PO lines awaiting approval.
10.	Select the PO ID link and the system will navigate to the Purchase Order Approvals page.
11.	Click the red minus (-) icon on an inserted Approver to remove him/her from the workflow.
12.	Receive the verification message, "Are you sure you want to remove XXXXXXXX from the approval chain?"
13.	Click OK .
14.	Click the Apply Approval Changes button.
15.	The Approver is now removed as an ad hoc Approver. Repeat as many times as necessary to remove inserted ad hoc Approvers.