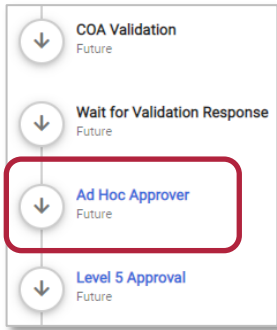


Adding an Ad-Hoc Approver During Checkout



Requestors can include an Ad-Hoc Approver during the checkout process. **The user being added as an Ad-Hoc approver:**

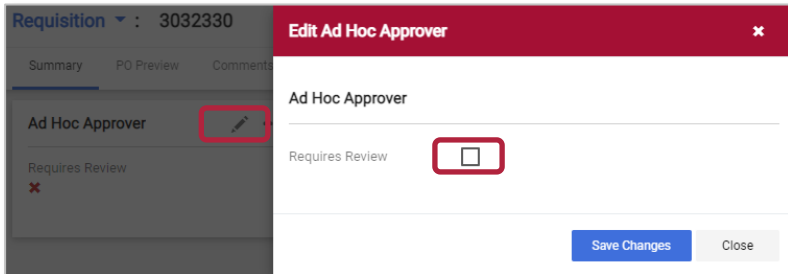
- Must be a Requestor or Approver
- Will NOT have the ability to edit a pending requisition
- Possesses the same abilities as an approver, including forwarding, adding additional Ad-Hoc approvers, etc.



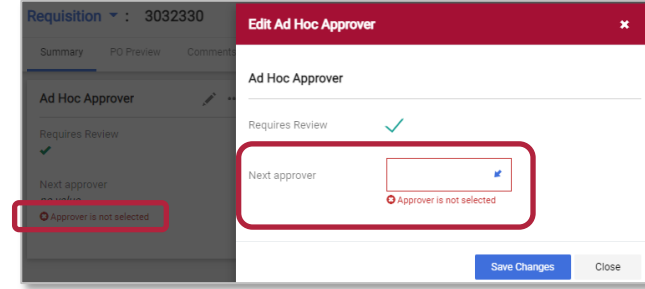
- The Ad-Hoc Approver will be the first approval to occur **before** the Level 1 – 6 Org approvals when the request is initiated by the **Requestor**
- **Approvers** adding an Ad-Hoc Approver will see it appear **after** their level of approval

Steps:

1. Prepare your cart as normal, proceed to checkout, and complete the necessary sections of the checkout process.
2. On the **Summary** tab, scroll down to the **Ad-Hoc Approver** section and click the **pencil icon**.
3. Check the **Requires Review** checkbox and click **Save Changes**.



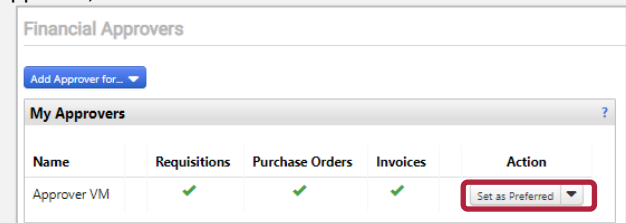
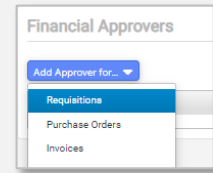
4. In the **Ad Hoc Approver** section, click the **Approver is not selected** error message or the **pencil icon** again. You can then click the blue arrow in the **Next Approver** field to select the desired Ad-Hoc Approver. Click **Save Changes**.



5. Continue with the checkout process.

Requestors can preload a list of frequently used Approvers in their profile. These will be available in the dropdown when selecting an Ad Hoc Approver.

1. Navigate to your User Profile by clicking the User Icon in the top right and then click **View My Profile** in the Quick Menu drop-down list.
2. Navigate to the **Default User Settings** in the left-hand menu and select **Financial Approvers**.
3. Click the **Add Approver For** button and select **Requisitions**. Disregard Purchase Orders and Invoices. These document types are not applicable for this feature.
4. Search for the Approver and click **select**.
5. You can select **Set as Preferred** to allow the selected Approver to appear as the default Approver, if desired.



Please note: Each transaction still requires the user to navigate to the Ad Hoc Approver section of the checkout and select the **Requires Review** checkbox to trigger the Ad Hoc routing.