

EP.020.690 - Using Ad Hoc Requisition Routing

Purpose	To use ad hoc requisition routing to add reviewers and approvers.
Description	<p>During the approval process, approvers can add other approvers or reviewers to a current or a later stage of the approval process. This action is called ad hoc approval, and it only applies to the approval instance in which the addition occurs. However, it does not affect the underlying process definition used for other requests.</p> <p>Ad hoc approvers are required to approve the requisition line.</p> <p>Ad hoc reviewers are users outside of the regular approval path that an approver or requester would like to review a transaction. Ad hoc reviewers are notified and provided with a link in a worklist entry or email to the transaction. Ad hoc reviewers do not approve or deny transactions, but they can add comments. All subsequent approvers will be able to see a reviewer's comments.</p>
Security Role	BOR_EP_REQ_MAINT BOR_EP_REQ_APPROVE BOR_AD_HOC_APPROVE
Dependencies/ Constraints	To be added as an ad hoc approver, the user must have the BOR_AD_HOC_APPROVER role.
Additional Information	Once an ad hoc approver or reviewer is added to a transaction approval path, they 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.

Procedure

Below are step by step instructions on how to add an approver/reviewer during the create a new requisition process.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the eProcurement link.
4.	Click the Create Requisitions link.
5.	Proceed with creating a new requisition.
6.	For more information on how to create an ePro requisition, see EP.020.502 – Creating A Special Request Requisition.
7.	Once all requisition information has been inputted, click the Save & Submit button.
8.	Click the Insert Approver (+) button on the approval level where the approver/reviewer needs to be added. <i>Note: Users can only add approvers/reviewers to existing approval paths. The “Start New Path” functionality is not enabled for the GeorgiaFIRST Financials.</i>
9.	From this page, you can choose to insert an Approver or a Reviewer. <ul style="list-style-type: none"> • The Approver option will require that the user selected approves the requisition line before it is approved. • The Reviewer option will insert the requisition into the selected users worklist, however, they will not need to approve the requisition line.
10.	Click the Look up button. <i>Note: If an Approver or Reviewer is not in this list, additional security for that user will need to be added. Contact your security administrator to have them added to the Ad Hoc Approval user list.</i>
11.	Click the User you want to insert on the requisition line.
12.	Click the Insert button.
13.	Click the Apply Approval Changes button to save.
14.	The routing status will be changed to “Pending” . Depending on the approvers notification options, a worklist entry and/or an email will be created.