GEORGIA*FIRST*
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
University System of Georgia • Information Technology Services

PeopleSoft 9.2

PO.020.170 – ADDING AD HOC APPROVERS TO WORKFLOW

Purpose	To use ad hoc routing to add Approvers to purchase orders.
Description	Ad hoc approvers are users outside of the regular approval path that can be added to review a transaction. Ad hoc approvers can be added to review a purchase order. Ad hoc approvers are required to approve the purchase order line. Adding an ad hoc approver does not affect the underlying process definition used for the regular approval workflow.
Security Role	**BOR_PO_APPROVE**
Dependencies/ Constraints	The Purchase Order must have a status of "**Pending Approval**" to be available for approval.
Additional Information	For more information about approving a purchase order, see PO.020.160 - Approving a PO. 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. 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.

Procedure

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

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. ***Note***: *users can also access the approval page from the Worklist navigation.*
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 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.

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. ***Note**: users can also access the approval page from the Worklist navigation.*
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 red minus **(-)** icon on an inserted Approver to remove him/her from the workflow.
13.	Receive the verification message, "Are you sure you want to remove XXXXXXX from the approval chain?"
14.	Click **OK**.
15.	Click the **Apply Approval Changes** button.
16.	The Approver is now removed as an ad hoc Approver. Repeat as many times as necessary to remove inserted ad hoc Approvers.