



CU Marketplace Tip: Inserting an Ad-Hoc Approver into Requisition Approval Workflow

What is it?

You can insert an additional approver into the workflow to review a Requisition, if needed. The Ad-Hoc Approver you want to insert must have the Department Requisition Approver role and must not already be in the approver pool for the Requisition. Requesters and Approvers can each only add one Ad-Hoc Approver Before inserting an Ad-Hoc Approver, you must ensure that the Accounting Codes (ChartStrings) are complete for the Requisition.

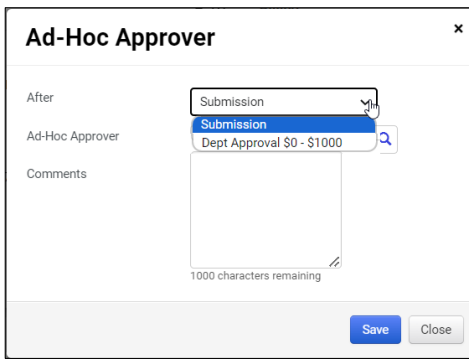
Inserting an Ad-Hoc Approver into Requisition Workflow

Requesters should be on the Checkout screen and have completed the Accounting Codes before inserting the Ad-Hoc Approver. Approvers must assign the Requisition to themselves in order to insert an Ad-Hoc Approver.

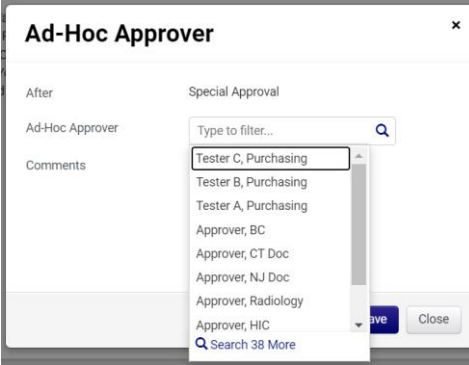
1. In the **Summary** pane on the right side of the of the Requisition page, click the **Dept Approval** step (and Special Approval, if applicable) in the Workflow to expand and view the approver pool for the requisition. If your Approver is not already in the approver pool, they can be inserted as an Ad-Hoc Approver.

2. Click the Ad-Hoc Approver **Select** link at the bottom of the General section.

The Ad-Hoc Approver window appears.

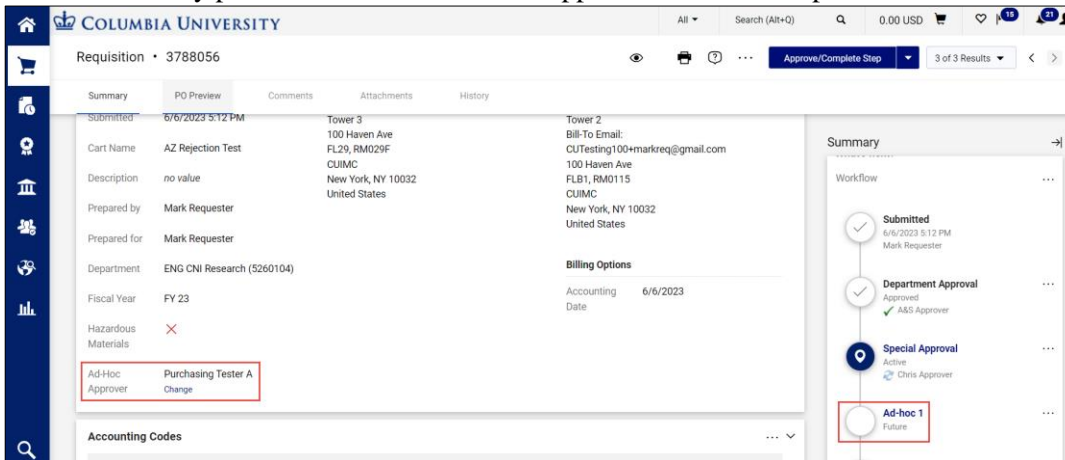


3. Click into the **After** field and select the approval workflow step where the Approver will be inserted.



4. Click into the **Ad-Hoc Approver** field and select the Approver from the list. You can type to filter the list of names. If an Approver is already included in the approval workflow for the Requisition, their name will not appear on the list.

5. Click **Save**. The Requisition will indicate the Ad-Hoc Approver, which can be changed, if necessary, and the Summary panel will indicate the extra approval workflow step.



Where do I get help?

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>