

Adding an Ad-Hoc Approver / Reviewer

Ad-Hoc Approvers and/or **Reviewers** can be added to the approval workflow from the **Purchase Order Approval** page. This can be done until approvals are complete. Approvers access the page from the approval Tile, buyers click the **Purchase Order Approval** link in the PO.

Ad-Hoc Approvers must have an **Approver Role** and proper security to access and perform the approval. Once the user has been added to the approval workflow, the PO displays in approvals. The Ad-Hoc Approver will receive an email notification as well as an action item in the Notification Bell for transactions pending approval.

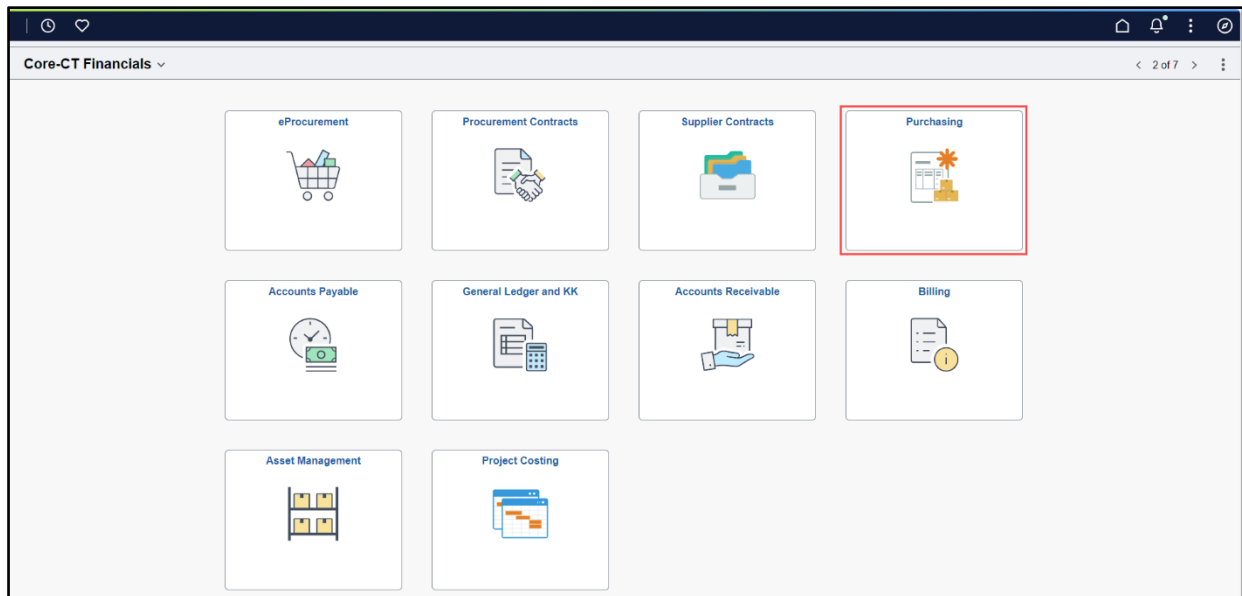
The **Ad-Hoc Approver** must complete their review and click an action before the approval can proceed.

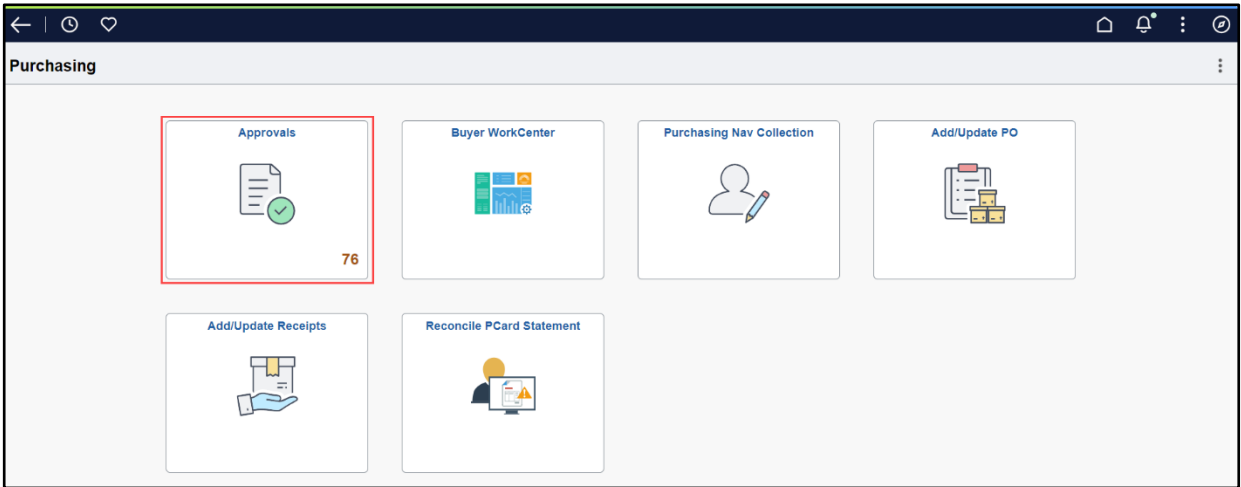
Ad-Hoc Reviewer is not required to have an **Approver Role** or security to access as they do not approve the PO. This function will Ad-hoc in a user to have access to review the document and make comments if needed. The Ad-Hoc Reviewer will receive an email notification as well as an alert item in the Notification Bell for transactions pending review.

The **Reviewer** is not required to complete their review for the PO approvals to complete.

Navigation for Approver:

Core-CT Financials > Purchasing > Approvals





Step	Action
1.	Approvers navigate to the Purchase Order Approval page from approvals, and selects the Purchase Order.
2.	Click on Approval Chain

Purchase Order

GM2 ASSOCIATES INC
1,000.00 USD Approve Deny More

Header is pending your approval

Summary

Supplier GM2 ASSOCIATES INC	PO Total 1,000.00 USD
PO Reference Add an Adhoc Approver	Status Pend Appr
PO ID 0000272403	Business Unit DOTM1
PO Date 05/07/24	Routed Date 05/07/24
Buyer DOT-	Budget Status Not Chk'd

[Edit Purchase Order](#)

More Information


[View Printable Version](#) >

Lines 1 row

Line Number	Item Description	Merchandise Amount
1	DOT01730536PE Contract Status Federal Rate Set Address steel beam end deterioration on Non-NHS Bridge No. 02648 carrying Route 5 over Quinnipiac River in North Haven using	1,000.00 USD >

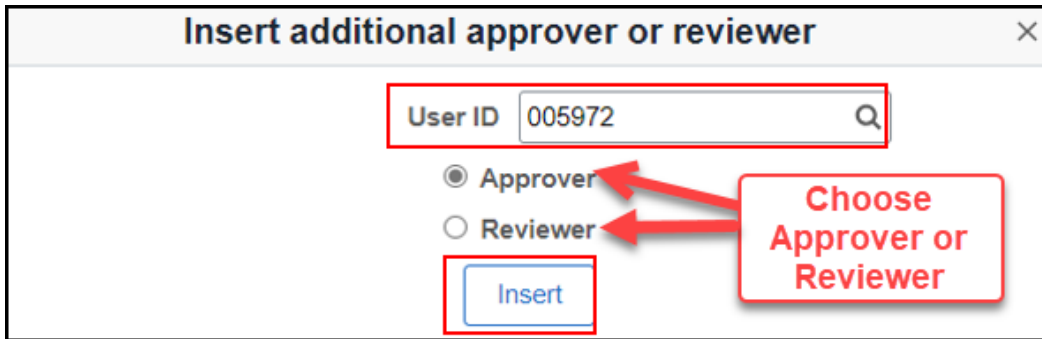
Approver Comments

[Approval Chain](#) >

3.	<p>Insert an Ad-Hoc Approver/Reviewer into a path at any point where there is an Insert Approver button.</p> <p>The Start New Path options are not used.</p>
4.	<p>Click the Insert Approver button.</p> <p></p>



5.	<p>The Insert additional approver or reviewer page displays in a separate window.</p> <p>Only a user with an Approval Role can be adhoced as an approver</p>
6.	<p>Enter User ID into the User ID field.</p>
7.	<p>Accept the default Insert as Approver.</p> <p>Click the Insert button.</p>



Step	Action
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8.	The user has been added to the workflow path as an Inserted Approver with a status of Not Routed .
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Step	Action
9.	Approve PO
10	When the first step is Approved . The Ad-Hoc Approver displays Pending and the PO will display on their worklist.



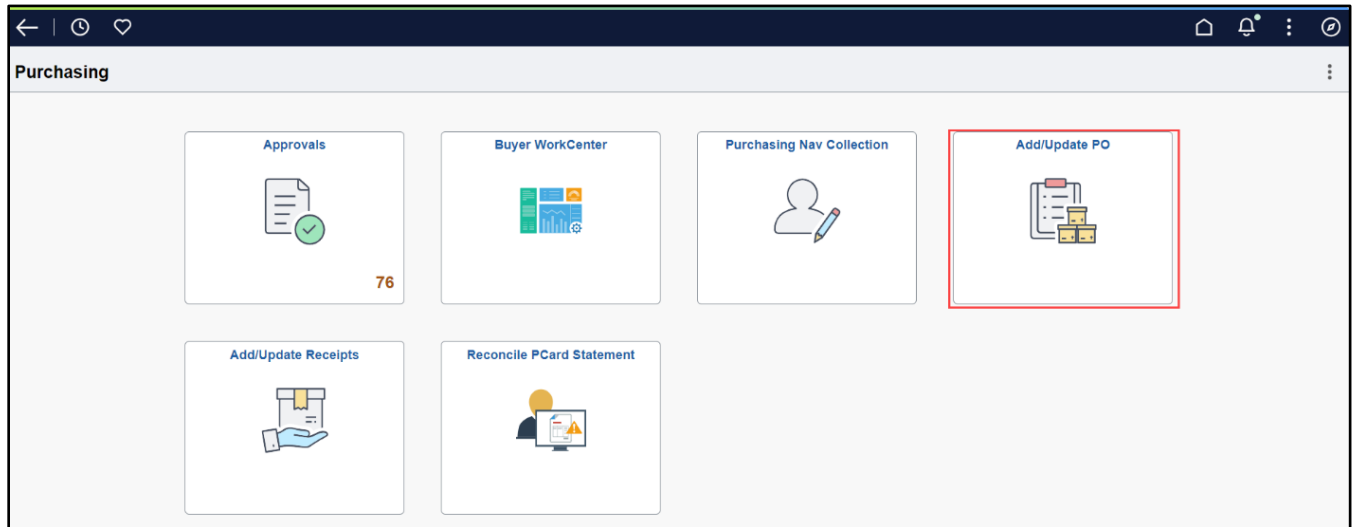
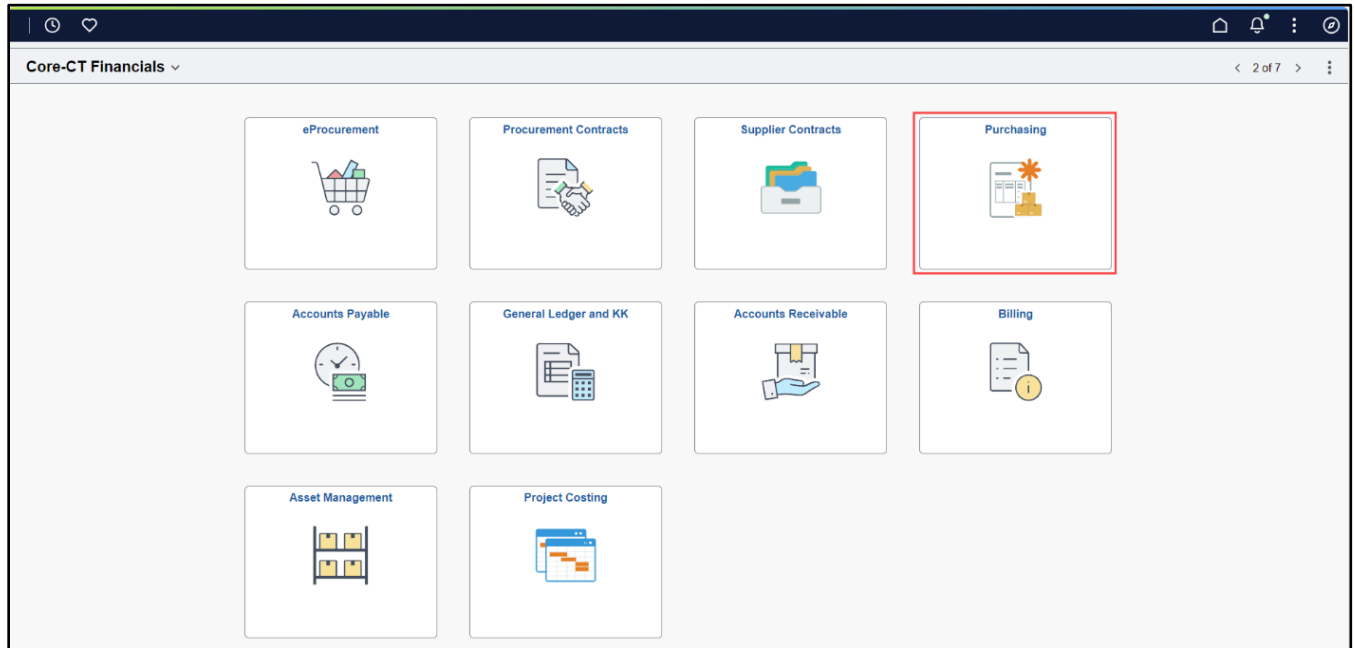
Step	Action
11.	End of Procedure for Approver.

[Navigation for Buyer or Adhoc from PO page:](#)



Navigation: Core-CT Financials > Purchasing > Add/Update PO

1.	Purchasing> Add/Update PO
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2.	A buyer clicks the View Approvals link on a PO after submitting it for approval.
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Add/Update POs New Window | Help | Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit DOTM1 PO ID 0000272403 PO Status Pend Appr ✗
 Budget Status Not Chk'd Hold From Further Processing

Copy From

> Header ⓘ

Add Items From ⓘ Catalog Item Search **Select Lines To Display** ⓘ Search for Lines Line To Retrieve

Lines ⓘ

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price
1	<input type="text"/>	DOT01730536PE	1.0000	EA	81000000	1,000.00000

View Printable Version *Go to ... More ...

View Approvals

Save Return to Search Notify Refresh

- | | |
|----|---|
| 2. | Insert an Ad-Hoc Approver/Reviewer into a path at any point where there is an Insert Approver button.

The Start New Path options are not used. |
| 3. | Click the Insert Approver button. |

View Approvals

Business Unit ECDM1 PO ID 000022527 View Printable Version
 PO Total 10.00 USD PO Status Pend Appr PO Date 08/28/2024
 Supplier ID 0000010008 GRAINGER INDUSTRIAL SUPPLY Budget Status Not Chk'd
 Buyer 452571 User Name ECD-Shrestha Smita Justification No justification entered by buyer.

PO Reference TEST DEFAULTS

> Review Lines

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 000022527:Pending

PO AMOUNT APPROVER

Pending Multiple Approvers PO Amt Approver Less Than \$10

PO Chartfield Approver

Purchase Order 000022527:Awaiting Further Approvals

PO Chartfield Approver

Not Routed Multiple Approvers PO Chart Field Approver

[Return to Purchase Order](#)

4.	The Insert additional approver or reviewer page displays in a separate window. Only a user with an Approval Role can be adhoced as an approver
5.	Enter User ID into the User ID field.
6.	Accept the default Insert as Approver . Click the Insert button.



Step	Action
7.	The user has been added to the workflow path as an Inserted Approver with a status of Not Routed . The Apply Approval Changes button displays, this is a required step which ensures updates save to the workflow. Additionally, clicking this option allows a user such as a buyer to apply the change without having to perform an approval action.

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000272403: Pending View/Hide Comments Start New Path

PO AMOUNT APPROVER

Pending Multiple Approvers PO Amt Approver Less Than \$10K → Not Routed DOC- Inserted Approver → Not Routed DMV- Inserted Approver

Comment History

PO Chartfield Approver

Purchase Order 0000272403: Awaiting Further Approvals View/Hide Comments Start New Path

PO Chartfield Approver

Not Routed Multiple Approvers PO Chart Field Approver

Comment History

Apply Approval Changes

Step	Action
8.	The button is no longer visible indicating the change has been applied.
9.	When the first step is Approved . The Ad-Hoc Approver displays Pending and the PO will display on their worklist.

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000272403: Pending View/Hide Comments Start New Path

PO AMOUNT APPROVER

Approved
 DOT-
 PO Amt Approver Less Than \$10K
 05/16/24 - 6:09 PM

→

Pending
 DOC-
 Inserted Approver

+

Comment History

PO Chartfield Approver

Purchase Order 0000272403: Awaiting Further Approvals View/Hide Comments Start New Path

PO Chartfield Approver

Not Routed
 Multiple Approvers
 PO Chart Field Approver

+
→
+

Comment History

Step	Action
11.	End of Procedure.