



CU Marketplace Tip: Inserting Ad-Hoc Approvers into Requisition and Voucher Approval Workflow

What is it?

The CU Marketplace automatically assigns the approval workflow for Requisitions and Vouchers based on various criteria. Procurement Initiators can insert additional approvers *before* submitting the Requisition or Voucher into workflow. Approvers are able to insert additional approvers to the Requisition or Voucher they are approving once they assign the document to themselves. The Ad-Hoc Approver(s) you want to insert must have an Approver role.

Ensure that the Accounting Codes (ChartStrings) are complete first so that the corresponding Department Approvers are populated and can be viewed in the workflow step prior to adding an Ad-Hoc Approver.

Inserting Ad-Hoc Approvers into Requisition Workflow

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

1. In the **Summary** pane on the right side 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.

The screenshot shows the Requisition page with the Summary pane on the right. The Summary pane displays the workflow steps: Submitted, Req Validation, and Dept Approval. The Dept Approval step is highlighted with a red box, indicating it is the current step being viewed. The main pane shows the requisition details, including the item list and supplier information.

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

The screenshot shows the Ad-Hoc Approver window with the General section expanded. The Add link is highlighted with a red box. The window displays various fields for the requisition, including Cart Name, Description, Prepared by, Department, Ad-Hoc Approver, Multi-year PO, Fiscal Year, Manual Update Purchase, Shipping, and Billing information.

The Ad-Hoc Approver window appears.

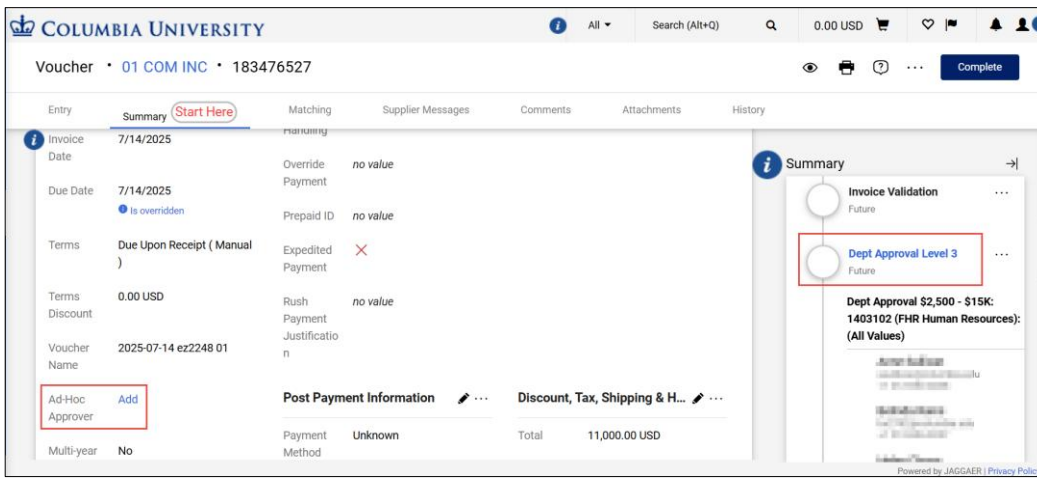
3. Click into the **After Step** field and select the approval workflow step where the Approver will be inserted. If you are adding multiple Ad-Hoc Approvers, be sure to specify the step order for each so that Approvers are in workflow in the desired order. Change the **Step Name**, if desired.
4. Click into the **Ad-Hoc Approvers** field and select the Approver from the list. You can type to filter the list of names. You can add multiple Ad-Hoc Approvers. Add **Comments**, if needed.
5. Click **Save**. The Requisition will indicate the number of Ad-Hoc Approvers, and the Summary panel will indicate the extra approval workflow step.

- Click the **Add** link to insert additional Ad-Hoc Approvers. You have the option to insert them after different approval steps, including after the first Ad-Hoc Approval.
- Click the **Edit** or **Delete** links to edit or remove the Ad-Hoc Approval step(s).

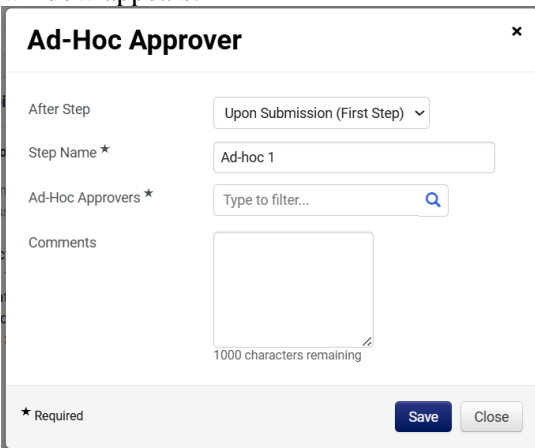
Inserting Ad-Hoc Approvers into Voucher Workflow

Initiators should be on the Summary tab and have completed the Accounting Codes before inserting the Ad-Hoc Approver. Approvers must assign the Voucher to themselves first in order to insert an Ad-Hoc Approver.

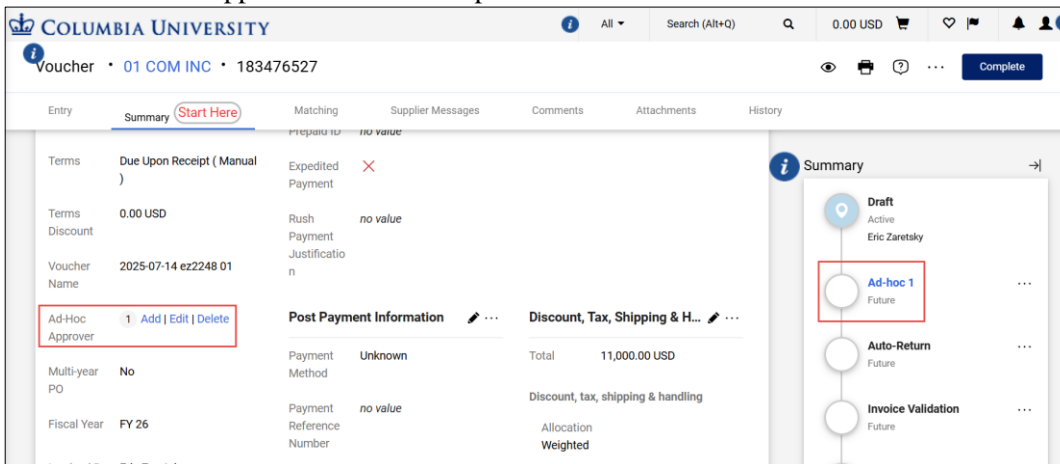
1. In the **Summary** pane on the right side of the Voucher page, click the **Dept Approval** step (and Special Approval, if applicable) in the Workflow to expand and view the approver pool for the Voucher.



2. Click the Ad-Hoc Approver **Add** link at the bottom of the General section. The Ad-Hoc Approver window appears.



3. Click into the **After Step** field and select the approval workflow step where the Approver will be inserted. Change the **Step Name**, if desired.
4. Click into the **Ad-Hoc Approvers** field and select the Approver from the list. You can type to filter the list of names. You can add multiple Ad-Hoc Approvers. Add **Comments**, if needed.
5. Click **Save**. The Voucher will indicate the number of Ad-Hoc Approvers, and the Summary panel will indicate the extra approval workflow step.



- Click the **Add** link to insert additional Ad-Hoc Approvers. You have the option to insert them after different approval steps, including after the first Ad-Hoc Approval.
- Click the **Edit** or **Delete** links to edit or remove the Ad-Hoc Approval step(s).

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>