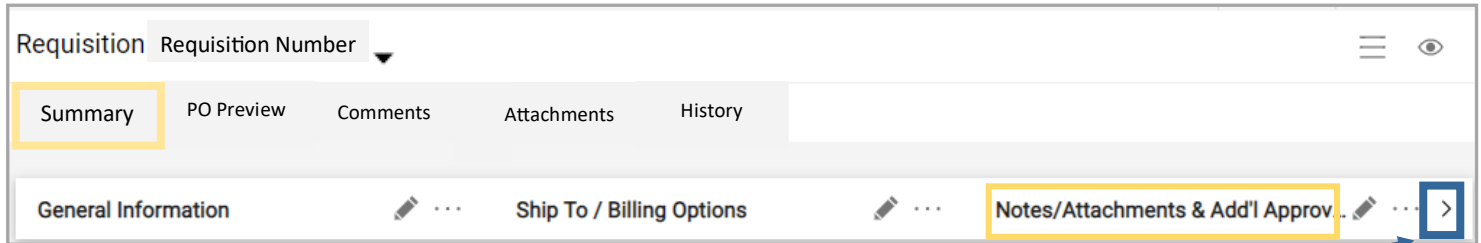
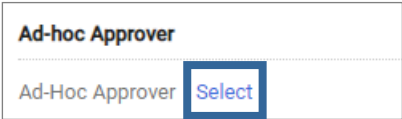


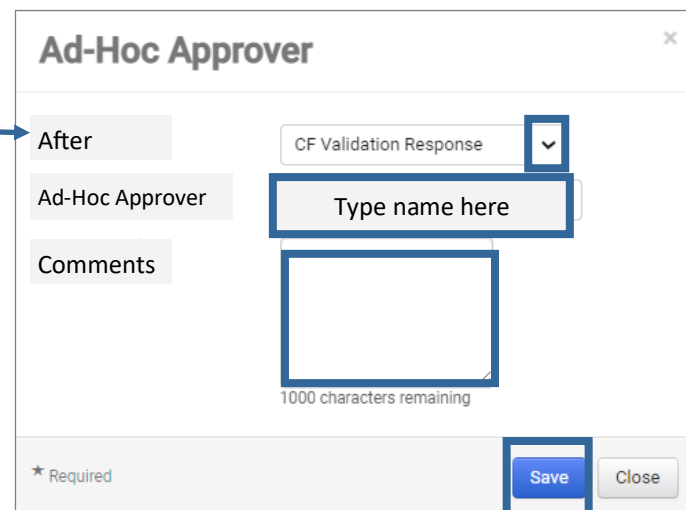
# Ad-Hoc Approver in Cart

This feature in UShop can be used to add an Ad-Hoc Workflow Step into Requisition Workflow **before** it has been submitted. In this way, once the Cart is submitted, (and turns into a Requisition) the individual added through this process will be required to approve the new Workflow Step. This can be useful to add an additional level of review and approvals, especially for individuals who have GFA for the orders they are submitting. This step will prevent those orders from auto-approving. Note that this process occurs after **Proceed to Checkout** has been selected but **before Submit Requisition**.



## Additional Approvals (Cart Status)

1. Click on the *Summary* Tab
  2. Ensure that the section is not collapsed
  3. Scroll to the *Ad-Hoc Approver*
  4. Click on Select
- 
5. Use the drop down to Select where the Ad-Hoc workflow step will be added in Workflow
    - **Submission** (Right after Submit Requisition)
    - **CF Validation Response** (After verification of ChartField)
    - **Departmental Approval** (After GFA occurs)
    - Procurement Approval (only appears as an option if the order is greater than \$5,000.00) (Not advisable to use)
  6. Type in the name of the person that is required to approve the Ad-Hoc workflow step
  7. Add a comment providing guidance regarding the order and/or the desired approval.
  8. Click Save



Look at the workflow under “What’s next for my order” to view the new workflow step which has just been added to this cart.



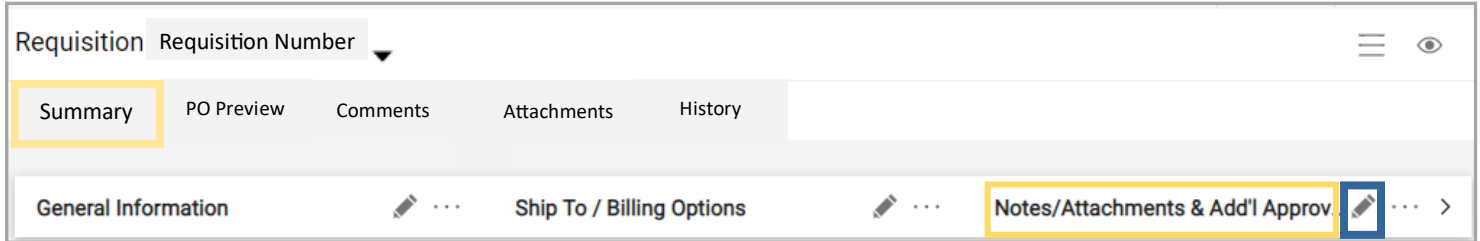
After Submit Requisition has been clicked, by a Requisitioner, then the cart will turn into a Requisition. The newly added workflow step will occur as selected above.



# Additional Approvals in Cart

## (Proceed to Checkout)

In addition to the Ad Hoc feature already covered, you may also use the Additional Approvals feature, which will similarly add an Additional Approver to a Requisition before it has been submitted. Use this feature if you need to add more than one approver during cart status. This feature in UShop can be used to add an Additional Approver to a Requisition **before** it has been submitted. In this way, once it is submitted, all individuals added through this process will be required to approve. This can be useful to add an additional level of review and approvals, especially for individuals who have GFA for the orders they are submitting. This step will prevent those orders from auto-approving. Note that this process occurs after **Proceed to Checkout** has been selected but **before Submit Requisition**.





## Additional Approvals (Cart Status)

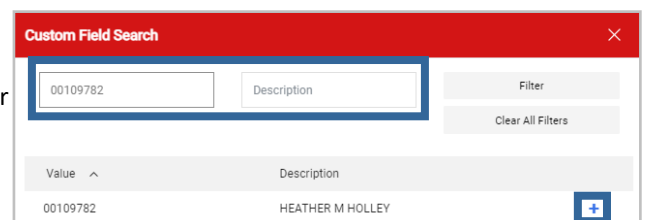
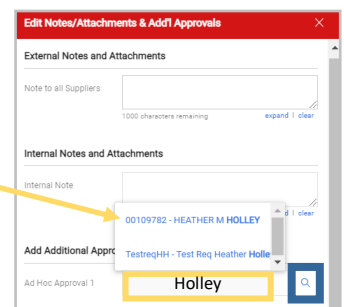
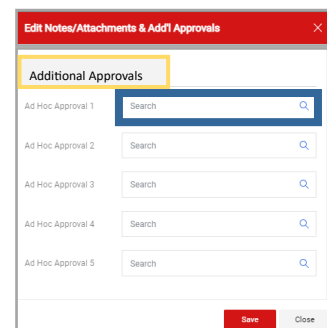
1. Click on the *Summary* Tab
2. Click on the Pencil next to *Notes/Attachments & Additional Approvals*
3. Scroll to the *Add Additional Approvals* section

💡 Note that up to 5 UShop users may be added to Requisition Workflow using this tool.

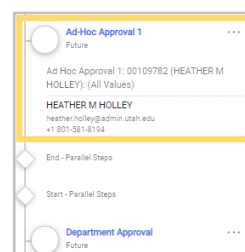
### 4. Search

💡 Search Options:

- Search by Last Name
  - Begin typing the last name of someone with UShop access. Notice the name(s) which appear. Click on the correct Name
- Search through Filter. Click on magnifier icon  to open a search field
  - Enter the Value **or** Description and hit enter on your keyboard
    - Value = Uid (replace U with 0)
    - Description = Name
  - Click **Plus Sign** to add the Additional Approver
  - Click Save  Close





5. Notice the new workflow step that was just created for this requisition. This Additional Approval must be done before Departmental Approval can occur.



# How will I be notified if added to an Ad-Hoc or Additional Approval step

## Ad-Hoc Workflow Step

1. An Action Item  will be created by the system.
  - o This requisition will be found in My PR Approvals Folder

MY PR APPROVALS 18					
	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER
<input type="checkbox"/>	154714498	A LOT OF FUN STUFF 	HEATHER M HOLLEY	2/25/2022 10:53 AM	Test Req Heather Holley

2. An Email, like the one below will be sent to your UShop profile email. (If email notifications are turned on)

Dear HEATHER M HOLLEY,

You have been assigned as an Ad-Hoc approver for Requisition #154714498. The Requisition has been submitted into workflow and is awaiting your approval.

Note from Assignee:

Use the link below to access the Requisition.

[View Requisition](#)

For instructions on how to approve, please click [here](#)