Adding Approvers to a Requisition

Every UShop requisition requires Department Approval, which is provided by an individual with Grant Financial Authority (GFA). In some procurement situations having additional individuals review and approve an order can be beneficial. This needs to be determined on a case-by-case basis by the department.

Approvers may be added in two ways:

I. **Additional Approver** - added by the Shopper or Requisitioner **before** an order is submitted into requisition workflow.

II. **Ad-Hoc Approver** - added by an Approver **after** an order is submitted into requisition workflow but is still pending approval.

I. **Additional Approver** - added by the Shopper or Requisitioner **before** an order is submitted into requisition workflow.

Key Points:
- These approvals do not replace the GFA approval requirement.
- Any UShop user may be added as an additional approver.
- Up to five additional approvers per requisition may be added. These approvals happen in parallel with each other and can occur in any order.
- These additional approvals must take place before the requisition can be finalized.
- Each approver added in the Additional Approvals section will need to approve the requisition before the Department Approval takes place. If the submitter (requisitioner) has GFA, the requisition will auto-approve after the Additional Approvals are completed.
- Users may select an Additional Approver as a default, so every order they place must be approved by that individual

1. To add an Additional Approver, click the edit link in the upper right corner:
2. Type the uNID of the individual to be added as an approver in the box, or click the Select from all values… link to search by name.

*Note: These additional approvals do NOT change the GFA requirement.

The instructions above allow you to add one or more Additional Approvers on an order-by order basis. See step 3 to add Approvers as a default for all orders placed by you.

3. Set Default Approvers as needed

To set one or more Additional Approvers as your default:

a. Open the dropdown menu from the upper toolbar by your name, and click on View My Profile.
b. Click on Default User Settings, then click on Custom Field.

c. In the Custom Fields and Accounting Code Default window:

1. Select the first tab, titled Header (int.)
2. Go to the Ad Hoc Approval 1 line and click Edit.

d. Click on Create New Value.
e. Search for the intended Approver either by typing their employee ID number in the Value field, or their name in the Description field.

NOTE: A user may not select him/herself as an Additional Approver.

Click Search.

f. See the name(s) displayed and check the Select box for the correct name. Click on Add Values.
g. Notice that:

1. The selected name is now displayed under Value and Description, but there is still "No Default Value" displayed.

2. To set a default, click on the name displayed under Description.

h. Check the Default box that now displays, and click on Save. Click Close to return to the Default Value List.

i. The new Default Value is saved, and will be in effect for every order you place.
II. Ad-Hoc Approver - added by an Approver after an order is submitted into requisition workflow but is still pending approval.

When an *Ad-Hoc Approver* is added to the workflow, it is required in addition to the original Department Approval.

1. **Assign to Myself**

   An approver obtains more options when the requisition is assigned to him/herself. Note that the requisition must still be in *Pending* status, meaning it has not yet been approved.

2. **General Tab**

   When the requisition is assigned to yourself, open the *General* tab and select *Ad-Hoc Approver*.

3. **Ad-Hoc Approver**

   The *Ad-Hoc Approver* window:

   1. Indicates the current approver step, or type of approval needed.

   2. Allows the selection of any UShop user as an *Ad-Hoc Approver*.

   3. Requires a comment explaining why this approval is being added.
4. Requisition Workflow

The Ad-Hoc approval step is added to the requisition workflow.

1. The **original** (Department) approval and the **Ad-Hoc** approval are **each required** steps to complete the workflow.

2. The **Ad-Hoc Approver** step remains in **Future** status until the original approval is complete.

5. Change or Delete Ad-Hoc Approver

Before the requisition workflow is complete, an **Ad-Hoc Approver** may be changed or deleted.

1. Open the **General** tab.

2. Click the **Change** link by the name of the **Ad-Hoc Approver**, and complete the fields as needed. Note that the Comments field is required whether you add a different person or simply delete the approver.