

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:

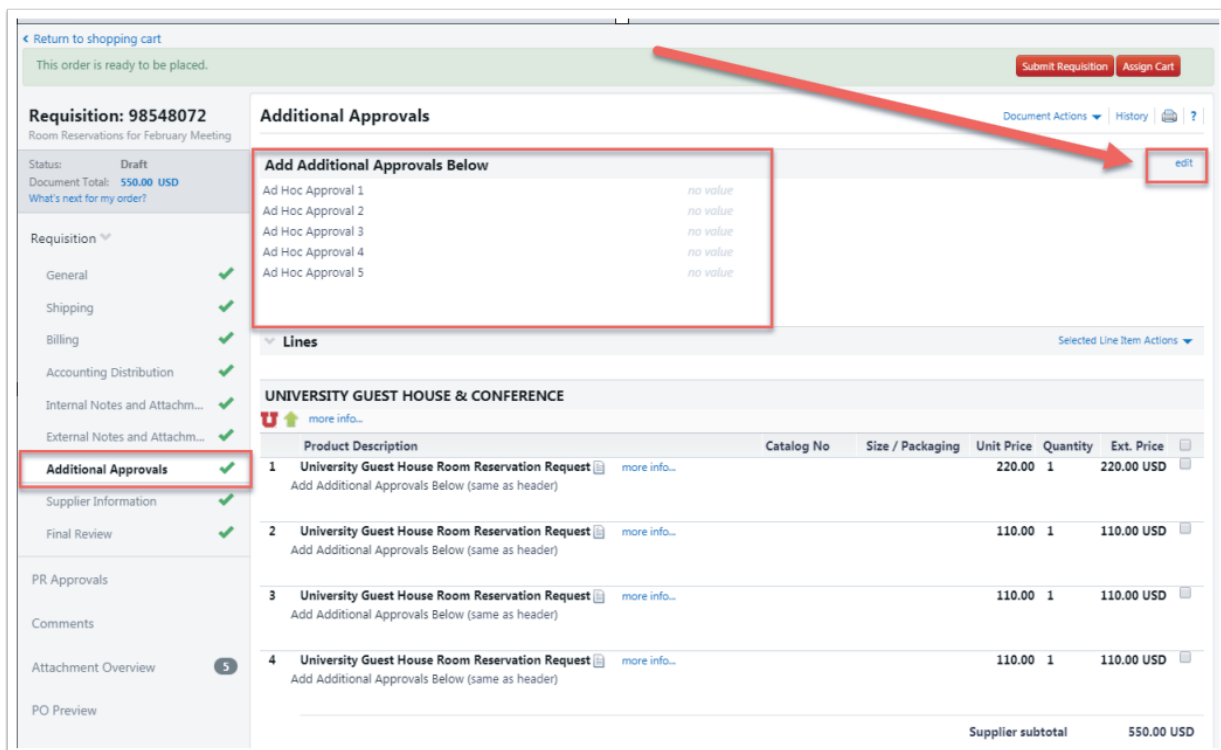
- I. Additional Approver - added by the Shopper or Requisitioner *before* an order is submitted into requisition workflow.
- II. Ad-Hoc Approver - added by an Approver *after* an order is submitted into requisition workflow but is still pending approval.

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:



The screenshot shows the UShop requisition interface for requisition 98548072. The 'Additional Approvals' section is highlighted with a red box, and a red arrow points to the 'edit' link in the top right corner of this section. The 'Additional Approvals' section lists five 'Ad Hoc Approval' entries, each with a 'no value' status. Below this, the 'Lines' section shows four items for 'UNIVERSITY GUEST HOUSE & CONFERENCE', each with a 'no value' status. The 'Additional Approvals' section is also highlighted with a red box, and a red arrow points to the 'edit' link in the top right corner of this section.

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.

Requisition
2017-02-14 u0533329 01
Status: Draft
Document Total: 559.00 USD
What's next for my order?

Additional Approvals
Document Actions History ?

Add Additional Approvals Below

Add Additional Approvals Below

Ad Hoc Approval 1
Ad Hoc Approval 2
Ad Hoc Approval 3
Ad Hoc Approval 4
Ad Hoc Approval 5

Select from all values...
Select from all values...
Select from all values...
Select from all values...
Select from all values...
Select from all values...

Save Cancel

1 Lunch for 30+ people more info... EA 559.00 1 EA 559.00 USD
Add Additional Approvals Below (same as header)

Supplier subtotal 559.00USD

Custom Field Search ?

Value
Description

Search

Search using the uNID (00XXXXXX format)
Search using either first or last 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:

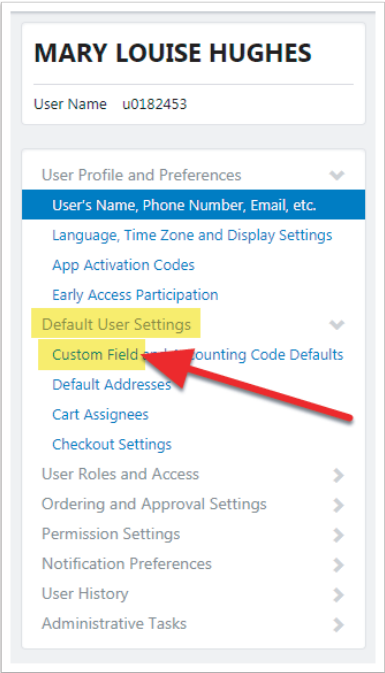
- a. Open the dropdown menu from the upper toolbar by your name, and click on View My Profile.

MARY LOUISE HUGHES ★ 4 234 15.00 USD Search (Alt+Q)

MARY LOUISE HUGHES

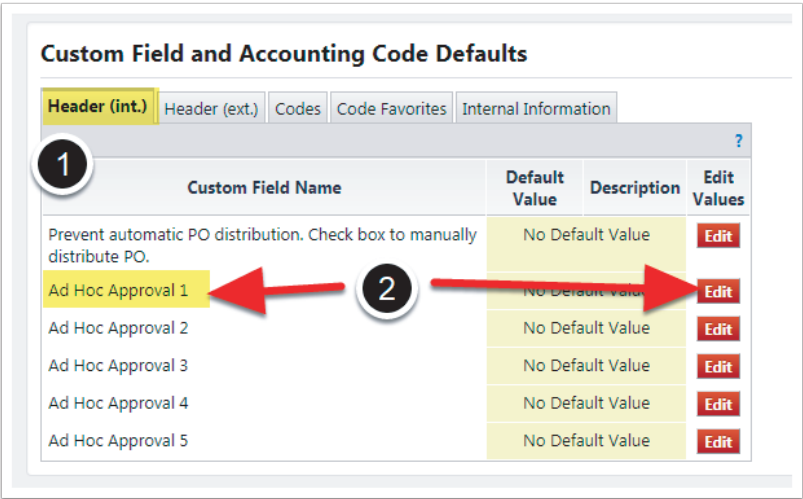
View My Profile
Dashboards
Manage Searches
Set My Home Page
Logout
Search Help For A Solution

b. Click on Default User Settings, then click on Custom Field.

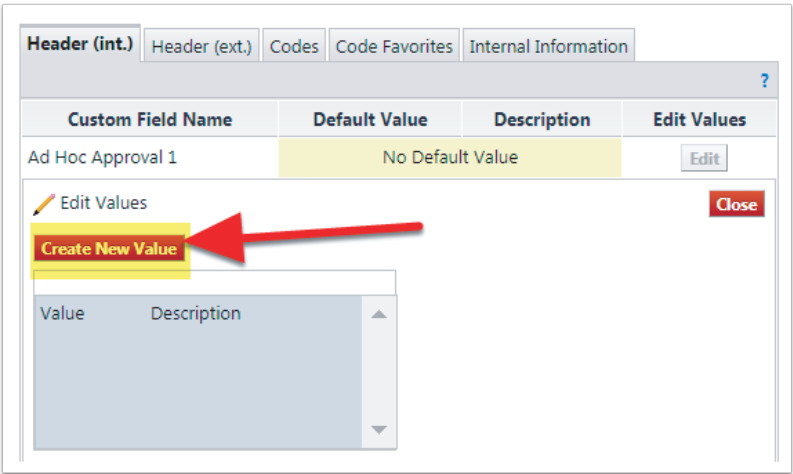


c. In the Custom Fields and Accounting Code Default window:

- 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.

Custom Field and Accounting Code Defaults

Header (int.)

Header (ext.)

Codes

Code Favorites

Internal Information

Custom Field Name	Default Value	Description	Edit Values
Ad Hoc Approval 1	No Default Value		Edit

Edit Values

Create New Value

Value	Description
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Search For Value

Field NameAd Hoc Approval 1

Value

DescriptionHolley

Results Per Page5

Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

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

Custom Field and Accounting Code Defaults

Header (int.)

Header (ext.)

Codes

Code Favorites

Internal Information

Custom Field Name	Default Value	Description	Edit Values
Ad Hoc Approval 1	No Default Value		Edit

Edit Values

Create New Value

Value	Description
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Results Values Found1

Page 1 of 1

5

Select

	Value	Description
<input checked="" type="checkbox"/>	00109782	HEATHER M HOLLEY

Add Values

Back to Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field 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.

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Codes | Code Favorites | Internal Information

Custom Field Name	Default Value	Description	Edit Values
Ad Hoc Approval 1	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
00109782	HEATHER M HOLLEY

Search For Value

Field Name: Ad Hoc Approval 1

Value:

Description:

Results Per: 5

Search

No Results Found

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

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

Edit Values Close

Create New Value

Value	Description
00109782	HEATHER M HOLLEY

Edit Existing Value

Value: 00109782

Description: HEATHER M HOLLEY

Default: ☒

Status: active

Save Remove

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

i. The new Default Value is saved, and will be in effect for every order you place.

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Codes | Code Favorites | Internal Information

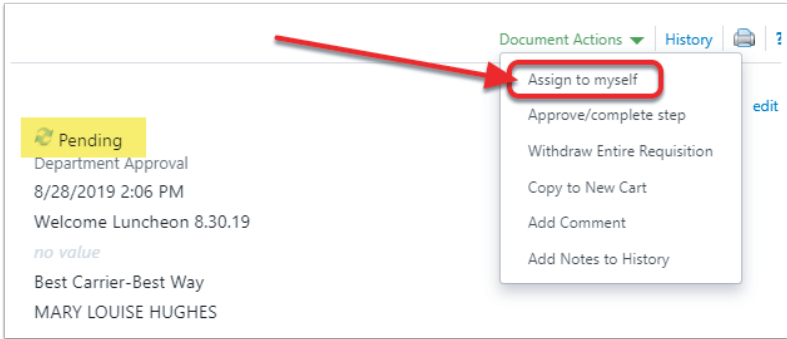
Custom Field Name	Default Value	Description	Edit Values
Prevent automatic PO distribution. Check box to manually distribute PO.	No Default Value		Edit
Ad Hoc Approval 1	00109782	HEATHER M HOLLEY	Edit
Ad Hoc Approval 2	No Default Value		Edit
Ad Hoc Approval 3	No Default Value		Edit
Ad Hoc Approval 4	No Default Value		Edit
Ad Hoc Approval 5	No Default Value		Edit

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.

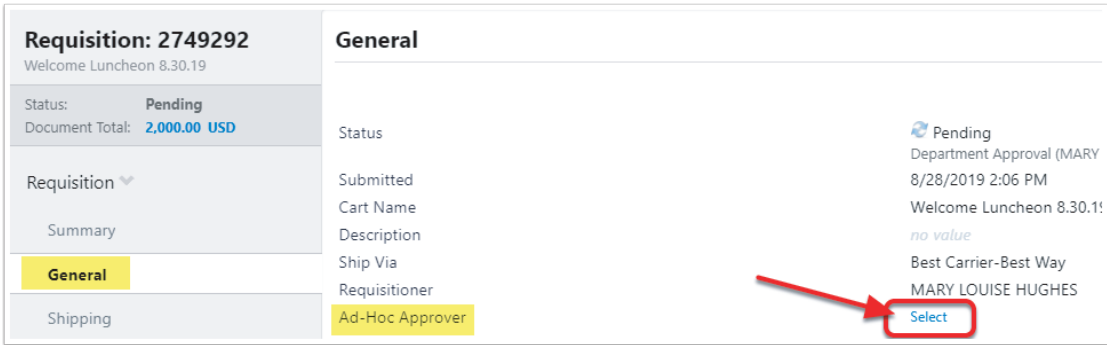
1. Assign to Myself

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

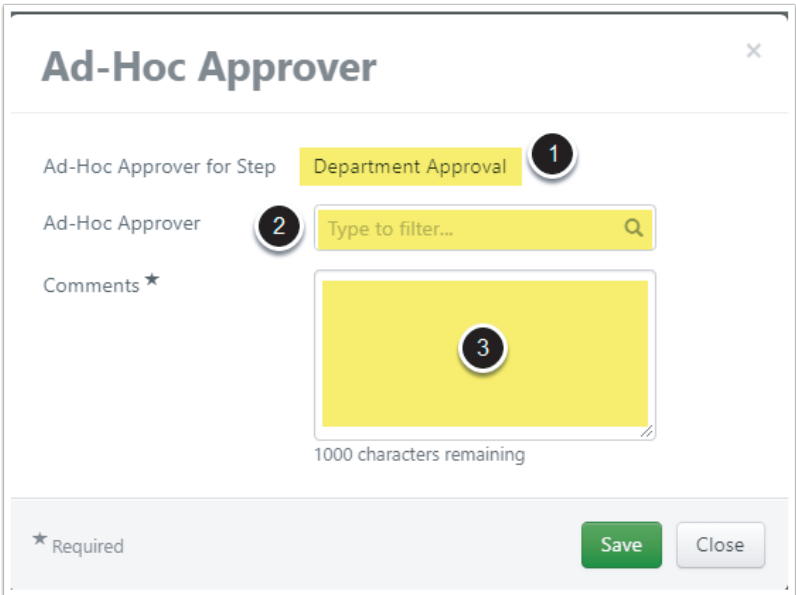
When the requisition is assigned to yourself, open the *General* tab and select *Ad-Hoc Approver*.



3. Ad-Hoc Approver

The *Ad-Hoc Approver* window:

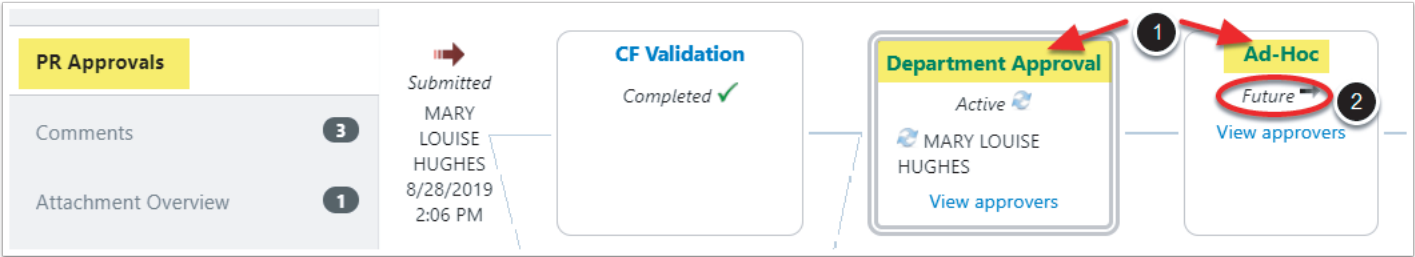
- 1. Indicates the current approver step, or type of approval needed.
- 2. Allows the selection of any UShop user as an *Ad-Hoc Approver*.
- 3. Requires a comment explaining why this approval is being added.



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.

The screenshot shows the 'General' tab of a requisition workflow. The 'Ad-Hoc Approver' field is highlighted with a red circle, and a red arrow points to the 'Change' link next to the name HEATHER HOLLEY. The 'Ad-Hoc Approver' field is currently set to 'no value'.