QUICK REFERENCE GUIDE

CSU The California State University

Ad-Hoc Approver



Add an additional approver for a specific step in the requisition workflow after your approval.

Ad-hoc approvers should be used when you need to add an approver in addition to your own. Note: An adhoc approver needs to have approval authority.

Ad-hoc approvers should be the exception. If you notice you are using them frequently, contact your Campus Core Project Team.

SET YOUR REQUISITION TO HAVE AN AD-HOC APPROVER IN REQUISTION WORKFLOW.

Follow the steps below to set an ad-hoc approver:

- 1. After assigning the requisition to yourself, navigate to the **Other Participant Information** section and click **select** next to the **Ad-Hoc Approver** field.
- 2. The Ad-Hoc Approver screen will appear. Select Submission for the After field.
- 3. You can name your **Ad-Hoc Approver** step, i.e., Ad-hoc 1 person's name. This is how the name will appear in the workflow. See workflow screenshot for visual.
- 4. Select the individual who will be the **Ad-Hoc Approver.** You can search for the individual using the magnifying glass.
- 5. Add **Comments** for the ad-hoc approver and click **Save**.
- 6. You will be taken back to the requisition where you can Approve/Complete the requisition.

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