Functions to Refine Carts Continued…

Adding an Ad Hoc Approver or Reviewer

There may be situations when a Shopper, Submitter, or Approver wishes to have another person Approve or Review a shopping cart. In those instances, the user can add an Ad Hoc Approver or Reviewer for the specific cart. Ad Hoc Approvers must take action to approve the cart, while Ad Hoc Reviewers may simply review the contents of the cart without taking action.

1. When creating the cart before submitting it into the workflow, select the Approval Process: Display/Edit Agents hyperlink. **Note:** Ad-Hoc Approvers or Reviewers may also be added to carts after they have been submitted but before Approval or after they have been saved. In these cases, open the cart and select the Edit button that will appear in the upper left corner. Then follow the steps in this section. Note that this process will restart the workflow which will include the new assignment you are making.

2. From the Approval Process Overview window, verify you are on the Header tab.
Functions to Refine Carts Continued…

3. To add an Approver, select **Add Approver**. If an approver has not been assigned to the cart, skip to step 4. If an approver has been assigned to the cart, a triangle will appear in the lower right corner of the **Add Approver** button and select either:

   a. **Above Selected Line** if the new Approver will act before the Approver(s) indicated on the line; or

   b. **Below Selected Line** if the new Approver will act after the Approvers(s) indicated on the line.

4. In the **Add Approver** box:

   a. Enter the approver’s Net ID; or

   b. Select the search button to search for the Net ID by name.

   c. Select **OK** to accept.
Functions to Refine Carts Continued…

5. The Ad Hoc Approver’s name will populate the form.

6. Follow steps 3-5 if you want to add a Reviewer for the Document.

7. Once all Approvers and Reviews are added, select OK.

8. From this point, you can continue working with the shopping cart. This specific cart will route to the Ad Hoc Approver or Reviewer based on their position in the workflow.