Step-by-Step Guide

Approver: 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. Open the cart requiring the Ad-Hoc Approval or Review.

2. Click on the Approval Process: Display/Edit Agents.

3. From the Approval Process Overview window, click on the Header tab.

4. Click the Add Approver button to add an Approver or the Add Reviewer button to add a Reviewer.
5. In the **Add Approver** or **Add Reviewer** box, enter the approver’s Net ID or click the drop-down button to search for the Net ID by name. Then click **OK** to accept.

6. The Approver’s or Reviewer’s name will populate the **Processor** field.
7. Repeat steps above for all additional Ad Hoc Approvers or Reviewers.

8. Click the **OK** button and complete the order or approval process.

9. This specific cart will route to the Ad Hoc Approver or Reviewer after the initial approval has occurred.