PantherExpress

How to Approve a Requisition as an Ad-Hoc Approver

If you have been assigned to approve a requisition as an ad-hoc approver, you can find the requisition in your "My Approvals" folder, or by clicking the email link in the notification you have received, which will take you directly to the requisition to be approved.

Note: You cannot set up a substitute for Ad-Hoc approvals. You cannot automatically forward your approvals to another end user. If you will be out of the office, you must notify PantherExpress Customer Service or the Procurement Specialist assigned to your area and provide an authorized approver to receive the approval requests in your absence.

Ad-Hoc Approvals

1. An Ad-Hoc approver has the option to approve, reject, or return a requisition. Consult the Approver quick reference guide for detailed instructions on how to reject or return a requisition. Note: when a requisition is returned – it is sent back to the requisition originator.
2. Open the requisition that has been assigned to you for approval from your My Approvals folder (*Orders > Approvals > Requisitions* to Approve) or click the email link in the notification you have received.
3. The requisition will open to the *Requisition>Summary* screen. Review the information.
4. Click the Available Actions menu and select Approve/Complete Step. Click *GO* to approve the requisition and send it to the next workflow step.
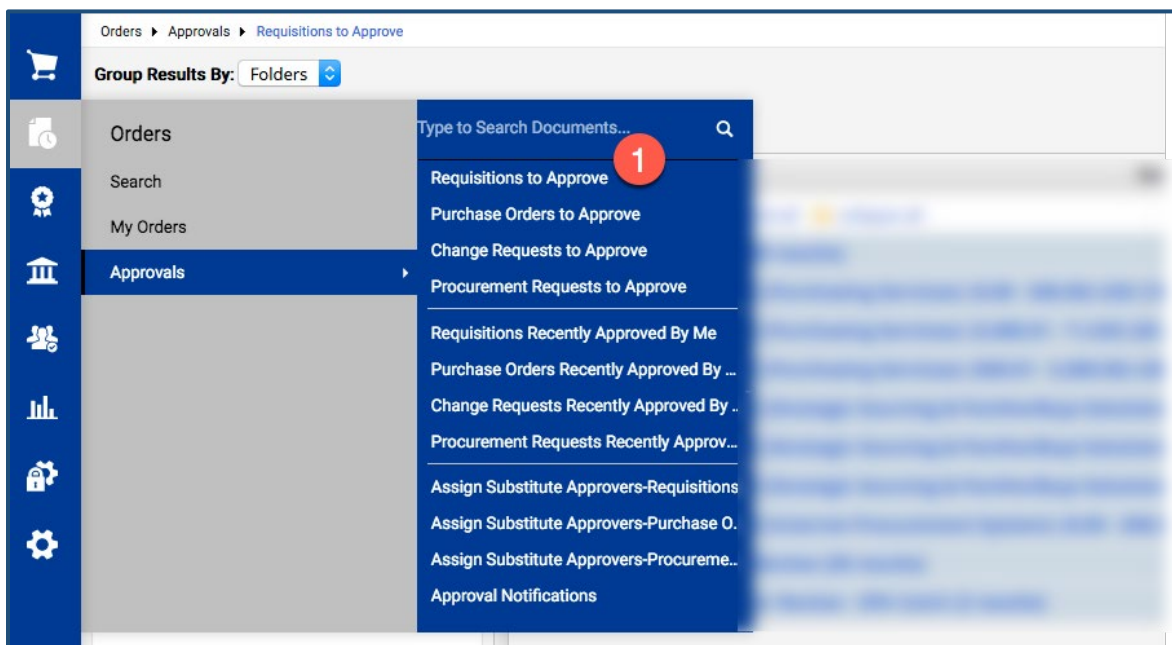

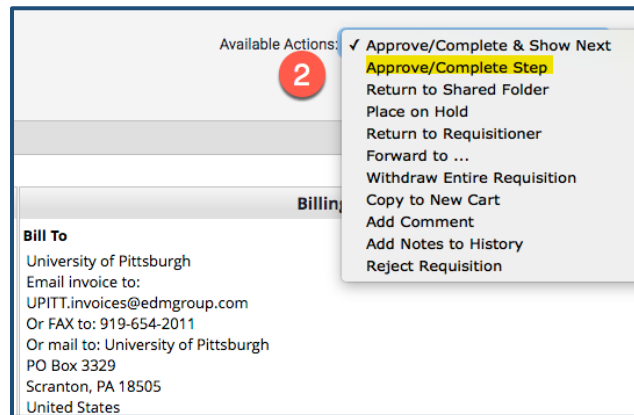*Figure 1 This screenshot shows the path to get to the requisitions to approve.*

Figure 2 Click on the Available Actions Dropdown and select Approve Complete step. Then click GO.

Sending a Requisition to Another Ad-Hoc Approver

If the need arises, you can send the requisition to another Ad-Hoc Approver. This may be necessary if the requisition spend is being split between two areas.

1. In the General area of the requisition document, *click the Select Link* next to the Ad-Hoc Approver field on the requisition. The Ad-Hoc Approver window opens.
2. In the Ad-Hoc Approver window, select a user in the Ad-Hoc Approver field using the type-ahead or search options.
3. Enter notes in the Comments field. These will be displayed in the Comments section of the requisition and in the text of the email notification.
4. Click Save. The name of the person selected as an ad-hoc approver is displayed next to the Ad Hoc Approver field. Comments are displayed in the Comments section of the requisition.
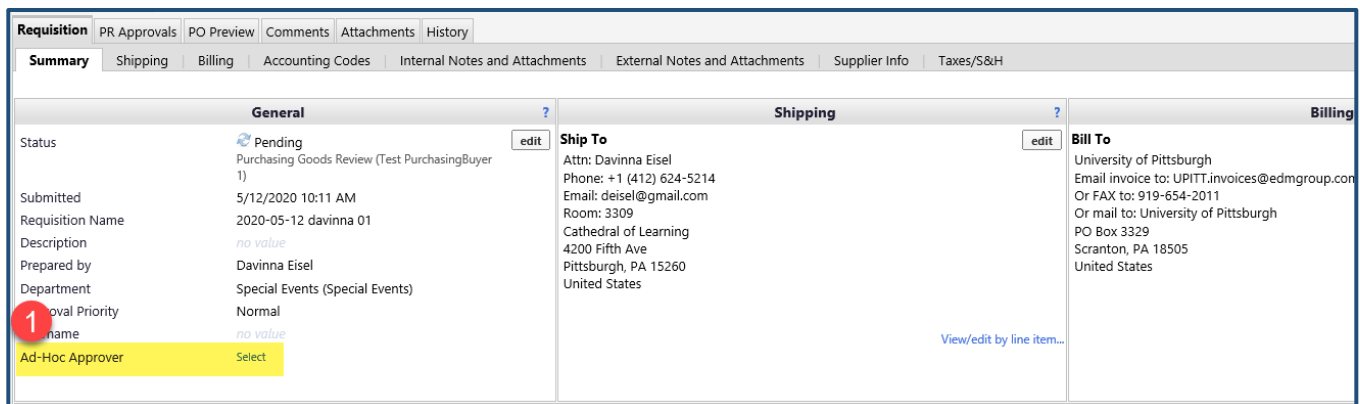

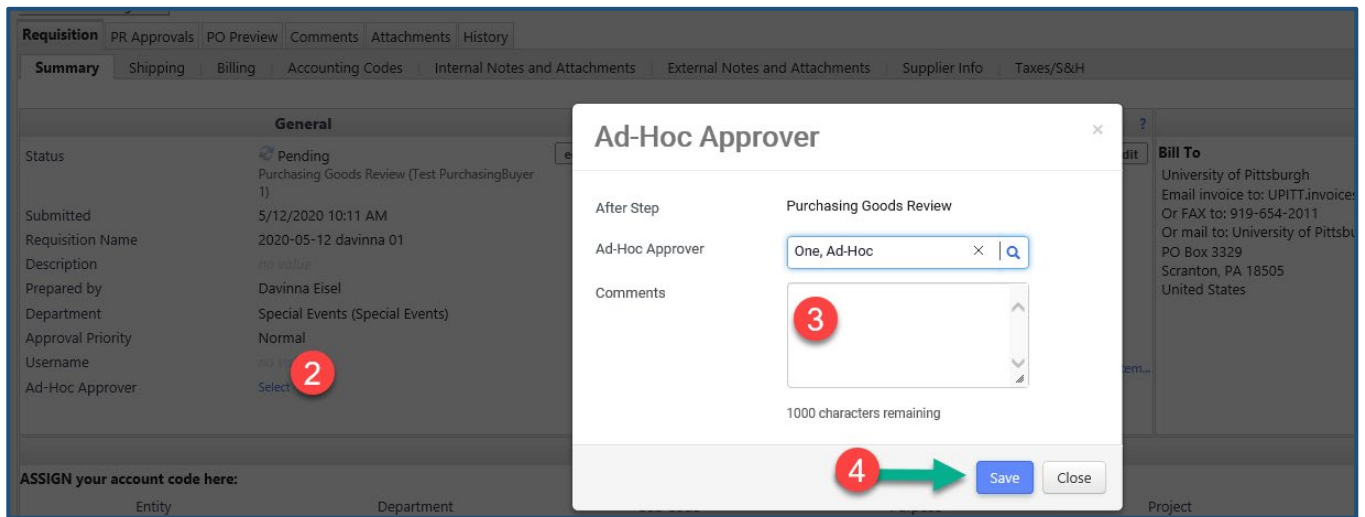*Figure 3 In the General area of the requisition, click on the select link.*

Figure 4 Type in the name of the Ad-Hoc approver

Note: The ad-hoc approver can be changed or deleted if the requisition has not been approved and is still assigned to the person who added the ad-hoc approver.