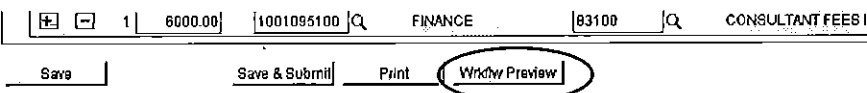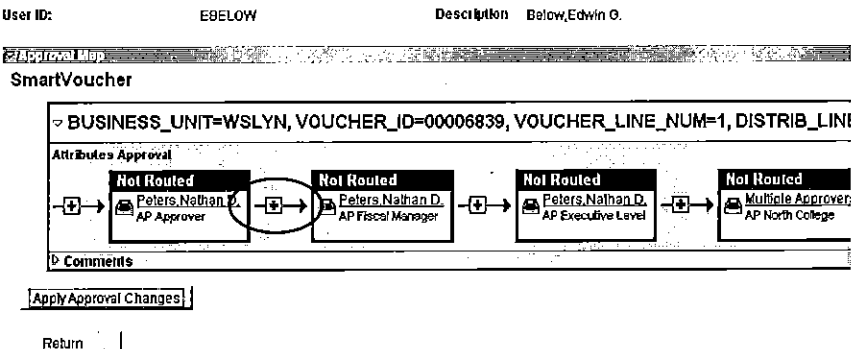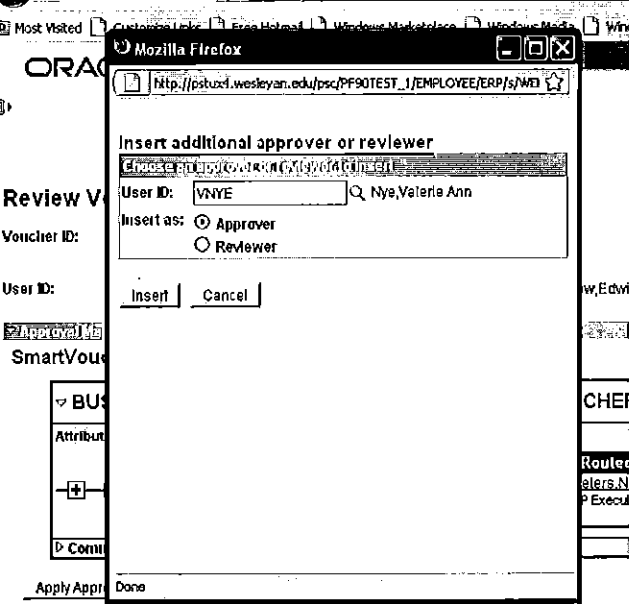# WFS Wesleyan Financial System Implementation

Inserting an Ad Hoc Approver

Important Note: When an ad hoc approver is inserted the document must be submitted to workflow immediately. An ad hoc inserted approver is **not saved** if you leave the document and return later to submit.

Complete the Smart Doc and budget check. The buttons at the bottom should appear as shown. Click the "Workflow Preview" button.	**⊞ ⊟** 1 6000.00 1001095100 🔍 FINANCE 83100 🔍 CONSULTANT FEES I Save Save & Submit Print (Wrkflw Preview) Done
The workflow for the document will appear. Click the " + " sign in the workflow path for the step at which you would like to insert the ad hoc approver.	User ID: E9BELOW Description Below,Edwin G. Approval Map SmartVoucher ▽ BUSINESS_UNIT=WSLYN, VOUCHER_ID=00006839, VOUCHER_LINE_NUM=1, DISTRIB_LINE Attributes Approval **Not Routed** Peters,Nathan P. AP Approver → **Not Routed** Peters,Nathan D. AP Fiscal Manager → **Not Routed** Peters,Nathan D. AP Executive Level → **Not Routed** Multiple Approver; AP North College ▷ Comments [Apply Approval Changes] Return

A window will open where you can find the approver you wish to add. Type in the user name in **all UPPERCASE**. If you do not know the full user name click the magnifying glass to search by name. Once you have typed in the user name you must still click the magnifying glass. Then click the "Insert" button.	🔲 Most Visited ...
	 ORA(**Mozilla Firefox** 〓□☒
	 ▣ http://pstux4.wesleyan.edu/psc/PF90TEST_1/EMPLOYEE/ERP/s/WD ☆
	
	 Insert additional approver or reviewer
	 Choose approver or reviewer to insert
	 Review V User ID: VNYE 🔍 Nye,Valerie Ann
	 Voucher ID: Insert as: ⦿ Approver
	      ○ Reviewer
	 User ID:
	    Insert Cancel w,Edwi
	 Approval L
	 SmartVou(
	 ▽ BU(CHEF
	 Attribut
	 ⊞ Routec eters,N P Execu(
	 ▷ Com
	 Apply Appr Done
	 Return

NOTE: If you cannot find the person as an ad hoc approver, send an e-mail to wfshelp@wesleyan.edu. Not all operators have been designated as an ad hoc approver, but they can be added.	
The ad hoc approver will appear in the workflow with the role of "Inserted Approver". You must then click the button that says "Apply Approval Changes" and return to the document.	User ID: EBELOW Description Below,Edwin G. SmartVoucher ▽ BUSINESS_UNIT=WSLYN, VOUCHER_ID=00006839, VOUCHER_LINE_NUM=1, DISTR **Attributes Approval** Not Routed → Peters,Nathan D. AP Approver → Not Routed → Nye,Valerie Ann Inserted Approver → Not Routed → Peters,Nathan D. AP Fiscal Manager → Not Routed → Peters,I AP Exec ▷ Comments Apply Approval Changes Return
On the document, click the "Save and Submit" button. **The ad hoc approver WILL NOT be saved if you do not immediately submit the document.**	⊞ ⊟ 1 6000.00 1001095100 Q FINANCE 83100 Q CONSULTANT FEE Save Save & Submit Print Wrkflw Preview Done
Once a document has been submitted the originator cannot add an ad hoc approver. However, each approver in the workflow path can add an ad hoc approver as long as it is done **BEFORE** the "Approve" button is clicked.	