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.

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.

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.

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**NOTE:** If you cannot find the person as an ad hoc approver, send an e-mail to wfhelp@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.

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.**

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.

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