How to Assign Kuali Ad Hoc Routings

At times the Proposal Aggregator or Approver may need to assign additional persons to view or approve the proposal. For example, an additional reviewer or approver may be needed when there is a large proposal with multiple units and the non-lead unit business person needs to review the proposal before it is sent to that unit’s Dept Chair.

Any Approver on the proposal can assign an additional Approver while the proposal is in progress or while the proposal is in routing.

Here are the Ad Hoc Actions and a description of each action:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FYI</td>
<td>User will get an email and see the proposal on their Action list. No approval will be required. User should review the proposal and go to the Action List Actions to confirm that he or she has seen the proposal, using the FYI Notification Action.</td>
</tr>
<tr>
<td>Acknowledge</td>
<td>User will get email and also see the proposal on their Action list. User must review and acknowledge that they have seen the proposal, using the Action List Actions, Acknowledge Notification Action.</td>
</tr>
<tr>
<td>Approve</td>
<td>User will get an email and will see the proposal on their Action list. User must approve during the routing and workflow as they would a normal routing approval. This approver is an additional approver and not in the normal routing chain.</td>
</tr>
</tbody>
</table>

To assign a new Ad Hoc notification during routing, do the following:
1. Navigate to the Proposal Summary/Submit Screen:

2. At the bottom of the Summary screen, click **Ad hoc Recipients** Button.

3. Select the Action Requested, either **FYI**, **Acknowledge**, or **Approve**.
4. Search for and select the person you are adding to the proposal. Then click Add Action button. Click Save.

5. Click Send Adhoc button at the bottom of the Proposal Summary Screen. This action will place the additional approver into the Route Log and send an email notice to the user, as well as an Action Item on their Action list.

6. View Route Log to see results. In the example below, Chanell Rome was added to this proposal routing as an FYI. Chanell is getting this information as an FYI notice and will not be signing as an approver.
7. Chanell should now go to her **Action List** and find the action **FYI** in the dropdown list.

8. Click **Take Actions** Button. This will make known to the proposal Route log that she has reviewed the proposal.

Below is another example. This proposal’s Lead Unit is 10200 (Mechanical Engineering) and another department administrator needs to approve. We added William to the Route log as an Adhoc person who will need to review and **APPROVE** the proposal.
Since William is an **Ad Hoc** approver, his approval will show up first in pending actions, but can be done any time during the routing process.

For help in assigning access or other proposal questions, please contact your OSP support person or, email us at OSPA@umbc.edu.

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