Setting up a Substitute Approver

Substitute Approvers can be set up to approve items on your behalf. For example, when you are out of the office. Guidance on usage may vary by School/Unit.

1. From the upper right corner of the screen, click the User icon and click View My Profile.

2. Expand the Ordering and Approval Settings and click View Assigned Approval Folders.

3. Select Type (Requisitions or Invoices) from the drop-down menu
   - Select Requisitions to cover the following requisition activity:
     - Marketplace and Non-Catalog Requests
     - Payment Requests and Non-Employee Reimbursement
     - Change Requests
   - Select Invoices to identify a substitute for invoices that have been escalated to Match Exception

4. Check the open check box(es) next to the approval queues to assign a substitute
   - Checking the folder "My Requisition Approvals" will allow the substitute to take action on requisitions assigned to you
   - Checking other folders allows your substitute to participate in unassigned incoming requisitions for a specific Org/Level

5. Select Assign Substitute to Selected Folders from the drop-down and click Go.

6. Search and select a Substitute Name and click Assign
   - Only those with the approver role will appear in the search results and can be added as a substitute
   - Optionally, provide a date range for the substitution

7. To remove a substitute approver, follow steps 1-4, then click Remove Substitute.

Please note:
- Both the approver and the substitute approver will receive B2P e-mails; either can act on those requests
- Approvers can only setup one person as a substitute approver at a time
- Assigning a Substitute for "My Requisition Approvals" folder will prevent you from being used as an Ad Hoc approver