Assigning a Substitute Approver

In the event that an approver is absent or unavailable, the user can designate another approver as a substitute. The substitute is able to review documents routed to the original approver. Substitutes can be assigned to a single approval folder or for all approval folders the user is responsible for reviewing. Substitutions can be manually stopped and started or you can schedule start and end dates. This task describes how to set up a substitution.

Step-by-Step

The goal of the task is to assign a substitute approver for an approver’s purchase requisitions and/or orders. Keep in mind, you can choose to use a substitute approver for documents in all folders (shared folders, My Approvals, etc.) or a select a specific folder. You can assign substitutes from the Approvals section of the application or you can assign substitutes for a specific user through the user profile. Following are the actions for selecting a substitute through the Approvals section. If you would like to make changes based on a single user, please see Managing Financial Approvers in the User Profile in the online searchable help or Basics Handbook.

1. Go to Orders & Documents > Approvals > Assign Substitute Approvers.
2. Select the type of document in the Refine Search Results section: Requisition, Purchase Order, Fulfillment or Invoice.
3. Select to view your own approvals under View Approvals For by selecting My Approvals in the drop-down, or select another approver for whom you have managed approvals before. You may also choose to Add Another Approver.

Option 1: Assign a substitute to a single folder.

1. Locate the folder in the folder list.
2. Select the Assign button under the Action column for the appropriate folder. The Assign Substitute window will display. Configure the substitution:
   a. Begin typing the name of the user in the Substitute Name field. The application will provide a list of matching users based on what you enter. Note: Only users who are allowed to approve documents will display in the list.
   b. If you would like to configure a date range for the substitution period, click the Include Date Range for Substitution checkbox. Select a Start Date and time and End Date and time. The substitution will begin and end automatically based on the configured dates. Note: The time and date will be based on the time zone of the original approver, not the substitute.
3. Click the Assign button. The substitute will be assigned.

Option 2: Assign a substitute to multiple folders.

1. For all folders you would like to assign, click the checkbox to the far right of the folder name in the list.
2. Click the Go button beside the Assign Substitute to Selected Folders dropdown. The Assign Substitute window will display. Configure the substitution:
   a. Begin typing the name of the user in the Substitute Name field. The application will provide a list of matching users based on what you enter. Note: Only users who are allowed to approve documents will display in the list.
   b. If you would like to configure a date range for the substitution period, click the Include Date Range for Substitution checkbox. Select a Start Date and time and End Date and time. The substitution will begin and end automatically based on the configured dates. Note: The time and date will be based on the time zone of the original approver, not the substitute.
3. Click the Assign button. The substitute will be assigned.

Option 3: Assign a substitute approver to all folders.

1. Click the Assign substitutes to All Requisition(PO/Fulfillment) Folders. The Assign Substitute window will display. Configure the substitution:
   a. Begin typing the name of the user in the Substitute Name field. The application will provide a list of matching users based on what you enter. Note: Only users who are allowed to approve documents will display in the list.
   b. If you would like to configure a date range for the substitution period, click the Include Date Range for Substitution checkbox. Select a Start Date and time and End Date and time. The substitution will begin and end automatically based on the configured dates. Note: The time and date will be based on the time zone of the original approver, not the substitute.
2. Click the Assign button. The substitute will be assigned.
Removing a Substitute Approver

You can end or remove a substitute approver from one or multiple folders.

**Step-by-Step**

The goal of the task is to remove a substitute approver for an approver's purchase requisitions and/or orders. You can remove substitutes from the Approvals section of the application or you can remove substitutes for a specific user through the user profile. Following are the actions for selecting a substitute through the Approvals section. **Note:** If you configured an End Date for the substitution you will not need to remove the substitution manually.

1. Go to Orders & Documents > Approvals > Assign Substitute Approvers – or – click on the View Assigned Approval Folders link in the User Access & Security section of the user profile. **Note:** If this option is not displayed automatically, click on the Show all... link.
2. Select the type of document in the Refine Search Results section: Requisition, Purchase Order, Fulfillment or Invoice.
3. Select to view your own approvals under View Approvals For by selecting My Approvals in the dropdown, or select another approver for whom you have managed approvals before. You may also choose to Add Another Approver.

**Option 1:** Remove a substitute from a single folder

1. Locate the appropriate folder.
2. Click the Remove button. The substitute will be removed.

**Option 2:** Remove from multiple selected folders

1. Select the checkbox to the right of each folder you would like to remove.
2. From the dropdown menu select Remove Substitute from Selected Folders.
3. Click Go. The substitutes will be removed.

**Option 3:** Remove substitutes from all folders

1. Select the End Substitute for All Requisition(PO/Fulfillment) Folders button above the folder list.
2. The substitutes will be removed.