



## eProcurement: Assigning a Substitute Approver for a Requisition or Purchase Order

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.

### 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.

1. Go to **Orders**  > **Approvals** > **Assign Substitute Approvers-Requisitions** or **Orders**  > **Approvals** > **Assign Substitute Approvers-Purchase Orders**.
2. Select the type of document in the **Refine Search Results** section.
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 view another approver's folders by selecting to **Add Another Approver**.
4. To **assign a substitute** to a **single** folder, click the **Assign** button under the Action column for the appropriate folder. The **Assign Substitute** window will display. Proceed to Step 7.
5. To **assign a substitute** to **multiple** folders, click the checkbox to the right of each folder name in the list, and select **Assign Substitute to Selected Folders** from the **Substitution Actions** drop-down button. The **Assign Substitute** popup window displays. Proceed to Step 7.
6. To **assign a substitute** to all approval folders, Click the **Assign Substitute to All [Document Type] Folders** button. The **Assign Substitute** popup window displays. Proceed to Step 7.
7. Configure the substitution:
  - a. Begin typing the name of the user in the **Substitute Name** field or select the search icon to enter other criteria to search for users. 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**.

c. Click the **Assign** button. The **substitute** will be assigned.

8. To remove a **substitute** approver:

- a. For a single folder, click the **Remove** button for the folder.
- b. For multiple folders, select the checkbox for each folder, and choose **Remove Substitute from Selected Folders** from the **Substitution Actions** drop-down button.
- c. For all folders, select **End Substitute for All [Document Type] Folders** button.

Substitute	Action
	Remove <input type="checkbox"/>

d.