OVERVIEW

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.

SET-UP STEPS

1. From the upper right corner of the screen, click the User icon

2. Click **Ordering and Approval Settings**

3. Click **View Assigned Approval Folder**

4. 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

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

7. Optionally, provide a date range for the substitution

8. Select Assign Substitute to Selected Folders and click Go

9. 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

HUIT GUIDELINES

Below are additional guidelines for HUIT approvers:

1. A B2P substitute must be an individual that already has approval responsibilities and access in the B2P system.

2. Use the B2P approver list on the HUIT intranet to identify someone you can assign as a substitute.
   - Managing Director should only select another Managing Director to ensure the same approval authority level.
   - Budget Manager should select another individual in their Service Area, if possible.
   - Contact the HUIT substitute approver so that they will know to look out for B2P notifications from your group.

3. Please use the date range functionality to indicate the length of time you will be away.