

# Assigning a Substitute Approver

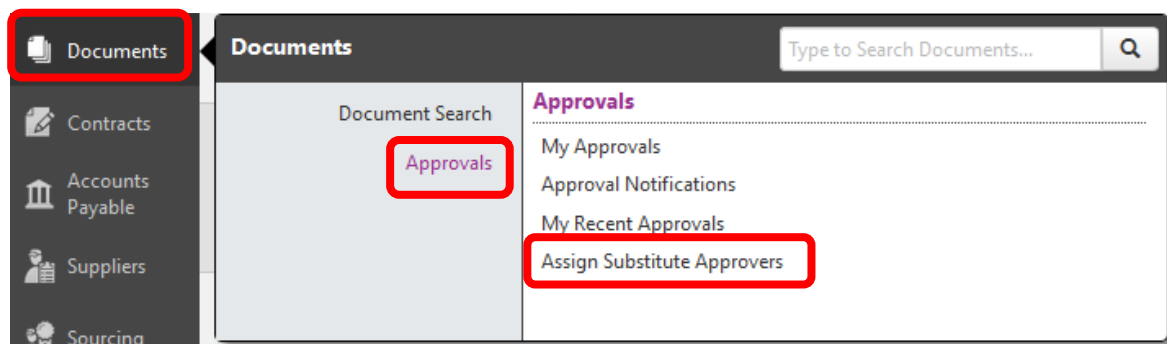
## Substitute Approvers

Assigning a substitute approver allows an approver to delegate their approval to another individual to take action on their behalf. This applies to any approval folder that the delegator assigns to the substitute. Your substitute approver must have the appropriate user settings to successfully carry out any approval action. The substitute approver will receive all future notifications and emails about items within the approval queue until they are removed as a substitute.

- ❖ [Setting Substitute Approvers](#)
- ❖ [Removing Substitute Approvers](#)

## Setting your Substitute Approver

1. Login to BennyBuy using your ONID ID and password.
2. From the BennyBuy home page, click on **Documents** located along the menu on the left side panel. Navigate to **Approvals** and select **Assign Substitute Approvers**.



3. \*\*\*You will need to assign your substitute for each of the three sections. Completing one section will only allow an individual to approve for that one document type. \*\*\*

# Assigning a Substitute Approver

4. In the Assign Substitute Approvers summary screen, you will see a list of your approval *Types*. Select the document type by clicking on the drop down menu under **Type**. Select the document type and find the folder you wish to assign to a substitute approver. Click **Assign**.
  - ❖ Requisition: Allows a substitute to approve any document in the assigned requisitions approval queue.
  - ❖ Purchase Order: Allows a substitute to approve any document in the assigned approval queue during the purchase order workflow.
  - ❖ Invoice: Allows a substitute to approve any document in the assigned approval queue during the invoice workflow.

Refine Search Results

Type

Requisition

Requisition

Purchase Order

Invoice

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

5. In the **Assign Substitute** window, type in the name of the user you wish to assign in the **Substitute Name** text box. As you begin typing, names should appear below the text box.

Assign Substitute

☐ Include Date Range for Substitution

Substitute Name \* User, Test

\* Required

Assign Close

- ❖ To include a date range, check the box next to **Include Date Range for Substitution**. Select a **Start Date/Time** and an **End Date/Time**. Click **Assign** to submit.

Assign Substitute

☒ Include Date Range for Substitution

Substitute Name \* User, Test

Start Date \* mm/dd/yyyy hh:mm a

End Date \* mm/dd/yyyy hh:mm a

\* Required

Assign Close

# Assigning a Substitute Approver

- After you click **Assign**, you will return to the **Assign Substitute Approvers** summary screen where you will see the name of the substitute approver under the **Substitute** field.

- ❖ Repeat steps 4-6 for each of the document types that you are assigning a substitute for.

Showing 1 - 4 of 4 Results Substitution Actions ▼

Results Per Page: 20 Sort by: Folder name ascending Page 1 of 1 ?

Folder Name	Approver	Substitute	Action	
410000 QBA Business Affairs invoice - 20	Michele Andersen	Lane Byrnes	Remove	<input type="checkbox"/>
410000 QBA Business Affairs invoice - 5	Michele Andersen	Lane Byrnes	Remove	<input type="checkbox"/>
Fund: K3078A (HHU ODE 619 Weber OCCRP): (All Values)	Michele Andersen	Lane Byrnes	Remove	<input type="checkbox"/>
My Invoice Approvals	Michele Andersen	Lane Byrnes	Remove	<input type="checkbox"/>

- To assign a substitute approver to all **Folder Name**'s within the specified **Document Type**, click **Assign Substitute to All Requisition Folders (or Purchase Order or Invoice)** in the upper right hand corner.

- ❖ This will assign all of the folders within the specific *Type*. See step 4 for clarification.

**Assign Substitute to All Invoice Folders** End Substitute for All Invoice Folders

Showing 1 - 4 of 4 Results Substitution Actions ▼

Results Per Page: 20 Sort by: Folder name ascending Page 1 of 1 ?

Folder Name	Approver	Substitute	Action	
410000 QBA Business Affairs invoice - 20	Michele Andersen		Assign	<input type="checkbox"/>
410000 QBA Business Affairs invoice - 5	Michele Andersen		Assign	<input type="checkbox"/>
Fund: K3078A (HHU ODE 619 Weber OCCRP): (All Values)	Michele Andersen		Assign	<input type="checkbox"/>
My Invoice Approvals	Michele Andersen		Assign	<input type="checkbox"/>

- ❖ To assign a substitute approver to multiple folders, you can check the box to the right of each folder and click **Substitution Actions** in the upper right hand corner. Select **Assign Substitute to Selected Folders**.

**Assign Substitute to All Requisition Folders** End Substitute for All Requisition Folders

**All Folder Results**

Sort by: Folder name ascending

**Substitution Actions ▼**

Assign Substitute to Selected Folders

Approver	Substitute	Action	
		Assign	<input checked="" type="checkbox"/>

# Assigning a Substitute Approver

## Removing Substitute Approvers

1. To remove a substitute approver, click **Remove** under the **Action** field.

Showing 1 - 4 of 4 Results

All Folder Results

Results Per Page: 20

Sort by: Folder name ascending

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Folder Name	Approver	Substitute	Action
410000 QBA Business Affairs invoice - 20	Michele Andersen	Lane Byrnes	<b>Remove</b>
410000 QBA Business Affairs invoice - 5	Michele Andersen	Lane Byrnes	<b>Remove</b>
Fund: K3078A (HHU ODE 619 Weber OCCRP): (All Values)	Michele Andersen	Lane Byrnes	<b>Remove</b>
My Invoice Approvals	Michele Andersen	Lane Byrnes	<b>Remove</b>

- ❖ To remove substitute approvers from all folders, click **End Substitute for All Requisition Folders**. Repeat for each of the assigned *Types*.

**Assign Substitute to All Requisition Folders** **End Substitute for All Requisition Folders**

All Folder Results

Sort by: Folder name ascending

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- ❖ Alternatively, you can check the boxes to the right of each folder, go to **Substitution Actions**, and select **Remove Substitute from Selected Folders**.

**Assign Substitute to All Requisition Folders** **End Substitute for All Requisition Folders**

All Folder Results

by: Folder name ascending

Approver	Substitute
	Test User

**Remove** ☒

Assign Substitute to Selected Folders

**Remove Substitute From Selected Folders**

2. Repeat step 1 for each of the Type Sections to remove the substitute approver completely from all queues.