Setting Substitute Approver

What is a Substitute Approver?

A substitute approver allows an approver to delegate their approval to another individual to take action on their behalf. Your substitute approver must also have the approver role to be selected as a substitute. The substitute approver will receive all future notifications and emails about items within the approval queue until they are removed as a substitute.

Setting a Substitute Approver

1. From the BennyBuy home page, click the Person Icon in the dashboard located in the top right of your screen and select View My Profile.

2. You will be directed to your BennyBuy profile. Click the Ordering and Approval Settings tab on the left side panel. Then, select View Assigned Approval folders.
3. This will take you to the **View Assigned Approval Folders** page. Under the **Refine Search Results** box, first select the type of document that you wish to assign a substitute for. If you are wanting to setup a substitute for every document, you will need to repeat the process below for Requisitions, Purchase Orders, and Invoices.

4. Once you select a document type, a list of approval folders will appear. Use the checkboxes next to a folder to select that specific folder, or use the checkbox at the top to select all approval folder. Once you have selected your desired folder, click **Go** next to the **Assign Substitute to Selected Folders** button.

5. The **Assign Substitute** box will appear. Begin typing the substitute’s name in the **Substitute Name** field. Select the user’s name when they appear. If you would prefer to do a user search, select the magnifying glass icon.
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6. If you would like to include a date range for the substitute, select the **Include Date Range for Substitution** checkbox. Enter the **Start Date** and **End Date**. If a date range is not specified, the substitution will be indefinite until manually removed by the original approver. Click **Assign**.

7. The page will refresh and you should see the substitution in effect. Repeat this process as needed for other document types (i.e. Requisitions, Purchase Orders, and Invoices).

Removing Substitute Approver

1. To remove a substitute approver, follow steps 1 – 3 as outlined above.
2. To remove a substitute from a specific folder, select the **Remove Substitute** button next to that folder.
3. To remove a substitute from multiple folders, first select the folders by using the checkboxes on the right hand side.

4. Then, select the Assign Substitute to Selected Folders link. A dropdown menu will appear. Select Remove Substitute From Selected Folders. Click Go. The substitute will now be removed.

5. Repeat this process as needed for other document types (i.e. Requisitions, Purchase Orders, and Invoices).