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.

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.
   - 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.
Assigning a Substitute Approver

6. 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.

7. 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.

   - 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.
Assigning a Substitute Approver

Removing Substitute Approvers

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

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

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

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