

Quick

# Reference

## Guide

### **Assigning Substitute Approvers**

#### In This Guide

 $\checkmark$ Assigning substitute approvers Ending substitute approvers

If an approver will be absent or will not have access to **BUY-U**, they can designate another approver as their substitute. Existing requisitions must be processed before adding a substitute approver. Only new requisitions will be automatically forwarded to the substitute approver, not existing requisitions. Substitute approvers are assigned at the folder level from the requisition. If you are in an approval step that is shared by more than one person, a substitute approver may not be necessary.

At a minimum, it is recommended to set up a substitute approver for your My Requisition Approvals folder. Any requisitions already stored in your My Requisition Approvals folder will not automatically be routed to your assigned substitute. You must complete these approvals. Only NEW requisitions and invoices will be routed once the substitute is designated.

#### Procedure

Navigate to requisition approvals, by selecting the Orders & Documents icon  $\rightarrow$  Approvals  $\rightarrow$  Assign Substitute 1. Approvers from the BUY-U homepage.

ñ	<mark>Buy</mark> ∗U					Test Approve	r 🔻 🛛 🛨 🛛 Action Items 🗾 🗍 I	Notifications   📜 137.00 USD   🔍		
)	i Shop $i$ Shopping $i$ Shopping Ho	meマ 〉Home/Shop						?		
	Orders & Documents		Everything	•		Go				
-	Document Search	Approvals	Go to: advanced se	Go to: advanced search   favorites   forms   quick order Browse: suppliers   categories   contracts						
	Approvals Approvals Approvals			-		_		?		
		My Recent Approvels Assign Substitute Approvers	ishor clentific		ал	jud Life	BIOTAD	ju je		
			а,	LSUHSC Scientific Supply Center	Cil Spaling	IDT	Filler Care - Ca			

2. Identify the folders for which you would like to set up a substitute approver and follow the directions below for EACH folder.

Orders & Documents ) Approvals ) Assis	n Substitute Approvers	▼ ) Manage Substitutions - Requisition					
				Assign Substitu	te to All Requisition Folders End St	ubstitute for All Requis	isition Folders
		Showing 1 - 2 of 2 Results	All Folder Results			Substitutio	ion Actions 🔻
Search Details	4	Results Per Page 20 💌	Sort by: Folder name ascending	•		🔳 Page 1	L of 1 🖹 🣍
		Folder Name	2	Approver	Substitute	Action	
Filtered by		My PR Approvals		Test Approver		Assign	
Type: Requisition		Supply Center as Contract Managed Catalog		Test Approver		Assign	
Refine Search Results							
Approver							
Test Approver (2)							

3. Click on the **Assign** button.

Orders & Documents 🍐 Approvals 🍐 A	ssign Substitute Approver	▼ Manage Substitutions - Requisition		Accion Substitu	to to All Requirition Foldors - Ford Su	ibstituto for All Poquis	itian Foldo
		Showing 1 - 2 of 2 Results	All Folder Results	Assign Substitu	reno var requisition rolders	Substitutio	n Actions
Search Details	•	Results Per Page 20 -	Sort by: Folder name ascending			🔳 Page 1	of 1 🕑 🕴
Filtered by		Folder Nam	je	Approver	Substitute	Action	
Tune: Requirition		My PR Approvals	Test Appr	over		Assign	
rype. Requisition		Supply Center as Contract Managed Catalog	Test Appr	over		Assign	
Refine Search Results							
Approver							

- If you want to assign a single substitute to all folders, click on the **Assign substitute to All Requisition Folders...** button located at the top of the page.
- 4. From the resulting **User Search** pop-up window, enter the name of the user that you would like to assign as the substitute approver. Only users with an approver role can be designated as a substitute approver. Select the user from the list that appears. Per folder, only one individual can be assigned as a substitute approver.

- If the substitute will perform the assigned duties for a specified period of time, click the **Include Date Range for Substitution** checkbox to set a date and time range for the substitution.

Assign Subs	titute		×
✓ Include Date Range fo	r Substitution		
Substitute Name *			]
Start Date *		<b>•</b>	
	mm/dd/yyyy hh:mm a		
End Date *		<b>I</b> •	
	mm/dd/yyyy hh:mm a		
* Required		Assign	Close

n Buy	<b>«U</b>			Test Approver 🔻 🛛 ★ 🛛	Action Items 2 Notifications   📜 137.00 USD   Q
📜 🐧 Orders &	Cocuments 👌 Approvals 👌 Assign Substitute Approver	rs $oldsymbol{ absolution}$ Manage Substitutions - Requisition			
		Showing <b>1</b> - <b>2</b> of 2 Results	All Folder Results	Assign Substitute to All Rec	usition Folders End Substitute for All Requisition Folders           Substitution Actions •
Search	Details	Results Per Page 20	Sort by: Folder name ascending	•	▲ Page 1 of 1 ▶
		Folder Name	Approver	Substitute	Action
Filtered	1 by	My PR Approvals	Test Approver		Assign
Type: R	Requisition	Supply Center as Contract Managed Catalog	Test Approver	Test ReqApp Start Date: 07/13/2015 12:00 AM 2 End Date: 07/31/2015 12:00 AM	Remove
Refine S	Search Results				
Approv	ver				
Test App	prover (2)				
Substitu	ute				
Test Rec	qApp (1)				

- 5. The substitute approver you selected is now displayed in the **Substitute** field.
- 6. Later, when you want to remove the substitution setting, click the **Remove** button for individual folders or the **End Substitution for All Requisition Folders** button.

#### You have successfully assigned and unassigned a substitute approver.