How to Schedule a Substitute Approver

This feature is new with the 13.2 release in July of 2013. It is available to approvers and can be transacted from the Approvals page.

A substitute approver is someone with approval authority in Miami Buyway (role = approver), but who is not already a designated approver for the index or approval queue.

1) From the Approvals page, select ‘manage substitutions’ from the secondary menu.

2) Select the type of document from the side-bar menu. The type of document determines the approval folders that will be available to assign to a substitute.

There are two types of documents having approval queues, Requisitions and Invoices. If you are the approver for both, these “manage substitute” steps should be completed for each type of document.

3) Select the folder(s) you want to assign to a substitute approver by one of the following:

- check the box to the right of the folder and select the “Assign Substitute to Selected Folders” from the available actions drop down and click “Go”
- click the “Assign” button next to the folder
- click the “Assign Substitute to All Requisition Folders” at the top of the page
4) When the Assign Substitute window opens, check to include a date range and enter the dates for the substitute approvals to take place. Enter substitute’s name also (Note: the system will only allow you to select someone who has the role of Approver in the system), and click “Assign”.

Assign Substitute

- **Include Date Range for Substitution**: [ ]
- **Substitute Name**: Timmy Test
- **Start Date**: 07/25/2013 7:00 AM
- **End Date**: 07/26/2013 5:00 PM

Assign Cancel
5) The folder now shows the substitute assignment.

<table>
<thead>
<tr>
<th>Folder Name</th>
<th>Approver</th>
<th>Substitute</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple</td>
<td>Wren Hanson</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget Approval Level 5 MRML</td>
<td>Wren Hanson</td>
<td>Timmy Test</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Start Date: 07/25/2013 7:00 AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>End Date: 07/26/2013 5:00 PM</td>
<td></td>
</tr>
<tr>
<td>Budget Approval Level 5 PUR1</td>
<td>Wren Hanson</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6) The substitute approver sees an icon next to the folder in his approval queue noting the substitution.

7) The substitution will expire on the end date or can be ended earlier by doing one of the following:
   - check the box to the right of the folder and select the “Remove Substitute from Selected Folders” from the available actions drop down and click “Go”
   - click the “Remove” button next to the folder
   - click the “End Substitute for All Requisition Folders” at the top of the page