

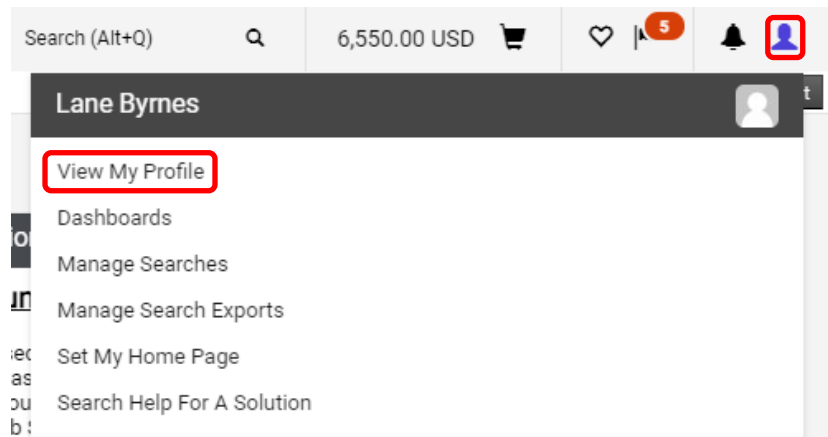
# Setting Substitute Approver

## What is a Substitute Approver?

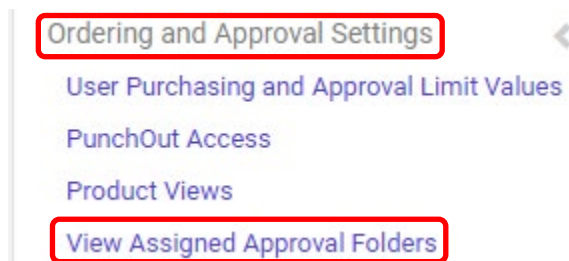
A substitute approver allows an approver to delegate their approval to another individual to take action on their behalf. Your substitute approver must also have the approver role to be selected as a substitute. The substitute approver will receive all future notifications and emails about items within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



# Setting Substitute Approver

- 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.

View Assigned Approval Folders

This user does not have any approver permissions assigned.

Showing 1 - 2 of 2 Results

All Folder Results

Remove Approver From Selected Folders Go

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

Folder Name	Approver	Substitute	Actions
My Sourcing Event Approvals	Lane Byrnes		<input type="checkbox"/>
PCMM - Sourcing Approval (Test)	Lane Byrnes		<input type="checkbox"/> Remove Approver

Search Details

Filtered by

Type: Sourcing Events - Approval

Refine Search Results

Type

- Sourcing Events - Approval
- Sourcing Events - Approval
- Sourcing Events - Evaluation
- Requisitions**
- Purchase Order
- Invoices
- Supplier Registrations

- 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.

View Assigned Approval Folders

Showing 1 - 5 of 5 Results

All Folder Results

Assign Substitute to Selected Folders Go

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

Folder Name	Approver	Substitute	Actions
410000 QBA Business Affairs requisition - 5	Lane Byrnes		<input type="checkbox"/> Remove Approver
AP Approval - NRA	Lane Byrnes		<input type="checkbox"/> Remove Approver
My PR Approvals	Lane Byrnes		<input type="checkbox"/>
New Supplier Update	Lane Byrnes		<input type="checkbox"/> Remove Approver
PCMM Req Approval	Lane Byrnes		<input type="checkbox"/> Remove Approver

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions

Approver

Lane Byrnes (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.

Assign Substitute

Include Date Range for Substitution

Substitute Name \*

Alex Sims

Sims, Alex

Sims, Aimee

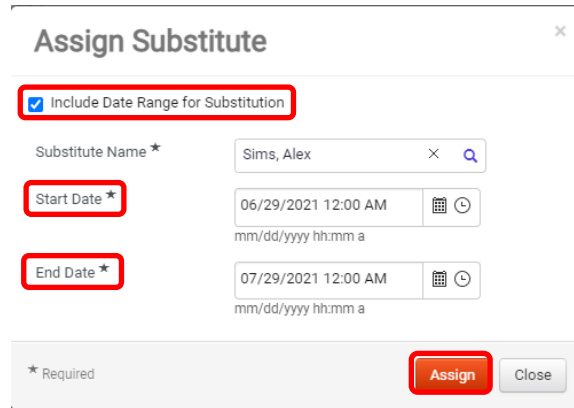
Groce, Alex

\* Required

Assign Close

# Setting Substitute Approver

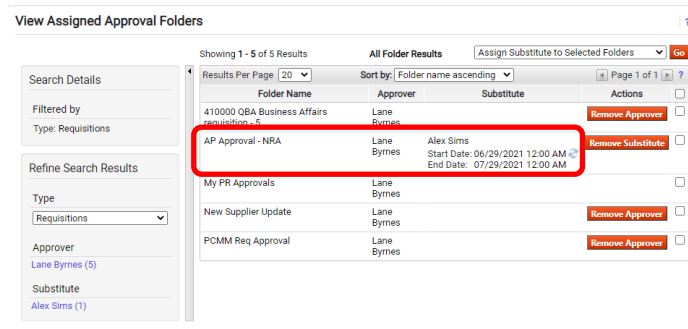
6. If you would like to include a date range for the substitute, select the **Include Date Range for Substitution** checkbox. Enter the **Start Date** and **End Date**. If a date range is not specified, the substitution will be indefinite until manually removed by the original approver. Click **Assign**.



The 'Assign Substitute' dialog box contains the following elements:

- Include Date Range for Substitution
- Substitute Name: Sims, Alex
- Start Date: 06/29/2021 12:00 AM
- End Date: 07/29/2021 12:00 AM
- Buttons: Assign, Close
- Footer: \* Required

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).



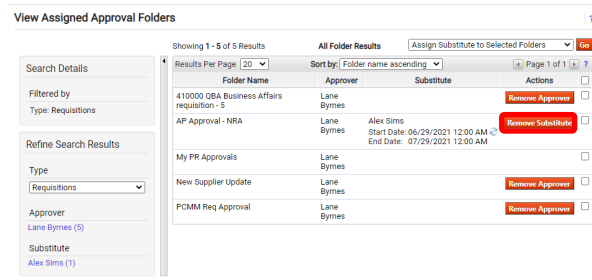
View Assigned Approval Folders

Showing 1 - 5 of 5 Results

Folder Name	Approver	Substitute	Actions
410000 OBA Business Affairs requisition - 5	Lane Byrnes		Remove Approver
AP Approval - NRA	Lane Byrnes	Alex Sims Start Date: 06/29/2021 12:00 AM End Date: 07/29/2021 12:00 AM	Remove Approver Remove Substitute
My PR Approvals	Lane Byrnes		
New Supplier Update	Lane Byrnes		Remove Approver
PCMM Req Approval	Lane Byrnes		Remove Approver

## 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.



View Assigned Approval Folders

Showing 1 - 5 of 5 Results

Folder Name	Approver	Substitute	Actions
410000 OBA Business Affairs requisition - 5	Lane Byrnes		Remove Approver
AP Approval - NRA	Lane Byrnes	Alex Sims Start Date: 06/29/2021 12:00 AM End Date: 07/29/2021 12:00 AM	Remove Approver Remove Substitute
My PR Approvals	Lane Byrnes		
New Supplier Update	Lane Byrnes		Remove Approver
PCMM Req Approval	Lane Byrnes		Remove Approver

# Setting Substitute Approver

- To remove a substitute from multiple folders, first select the folders by using the checkboxes on the right hand side.

View Assigned Approval Folders

Showing 1 - 5 of 5 Results

All Folder Results

Assign Substitute to Selected Folders Go

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

Folder Name	Approver	Substitute	Actions
410000 QBA Business Affairs requisition - 5	Lane Byrnes		Remove Approver <input type="checkbox"/>
AP Approval - NRA	Lane Byrnes	Alex Sims Start Date: 06/29/2021 12:00 AM End Date: 07/29/2021 12:00 AM	Remove Substitute <input checked="" type="checkbox"/>
My PR Approvals	Lane Byrnes	Alex Sims	Remove Substitute <input checked="" type="checkbox"/>
New Supplier Update	Lane Byrnes		Remove Approver <input type="checkbox"/>
PCMM Req Approval	Lane Byrnes	Alex Sims	Remove Substitute <input checked="" type="checkbox"/>

- 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.

All Folder Results

Assign Substitute to Selected Folders Go

Sort by: Folder name ascending

Remove Substitute From Selected Folders

Remove Approver From Selected Folders

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

Folder Name	Approver	Substitute	Actions
410000 QBA Business Affairs requisition - 5	Lane Byrnes		Remove Approver <input type="checkbox"/>
AP Approval - NRA	Lane Byrnes		Remove Approver <input type="checkbox"/>
My PR Approvals	Lane Byrnes		Remove Approver <input type="checkbox"/>
New Supplier Update	Lane Byrnes		Remove Approver <input type="checkbox"/>
PCMM Req Approval	Lane Byrnes		Remove Approver <input type="checkbox"/>

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