

How to Assign a Substitute (Proxy) Approver

Shopping is Easy in UNT System Marketplace!

What is a Substitute Approver?



A substitute approver is a person given temporary access to approve requisitions, invoices, etc. for a specific folder (or multiple folders) on the behalf of another person.



If an approver has a planned absence, they can assign a substitute approver for the period they will be gone to keep orders moving in their absence.



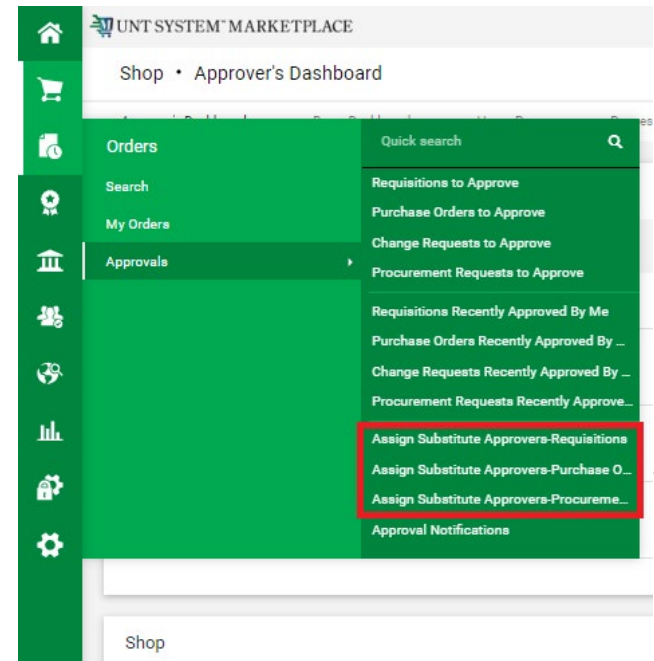
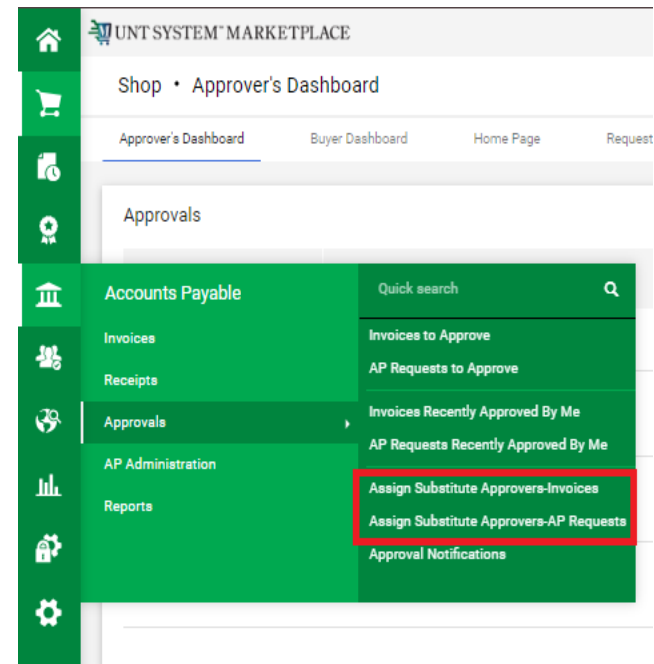
Substitute approvers can be assigned on a folder-by-folder basis, or all at once.



The substitute approver will be able to approve only the documents assigned, so substitute approvers for requisitions are assigned separately from substitute approvers for invoices.

Begin by navigating to the 'Assign Substitute Approvers' page for the document you wish to assign.

- ▶ Invoice approvals: Go to Accounts Payable -> Approvals -> Assign Substitute Approvers-Invoices
- ▶ Payment Requests: Go to Accounts Payable -> Approvals -> Assign Substitute Approvers-AP Requests
- ▶ Requisition Approvals: Go to Orders -> Approvals -> Assign Substitute Approvers-Requisitions
- ▶ PO Approvals: Go to Orders -> Approvals -> Assign Substitute Approvers-Purchase Orders



UNIVERSITY SYSTEM MARKETPLACE

Orders > Approvals > Assign Substitute Approvers-Requisitions

Showing 1 - 20 of 245 Results

All Folder Results

Results Per Page: 20

Sort by: Folder name ascending

Page 1 of 13

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type: Requisitions

View Approvals For: My Approvals

Approver: Owain Snyder (245)

Folder Name	Approver	Substitute	Action
Final Purchasing Review > 25k	Owain Snyder		Assign
Final Purchasing Review >= 100k	Owain Snyder		Assign
My PR Approvals	Owain Snyder		Assign
Next FY Orders Final Review	Owain Snyder		Assign
Next FY Orders Initial Review	Owain Snyder		Assign
Purchasing Review - 100001	Owain Snyder		Assign
Purchasing Review - 110010	Owain Snyder		Assign
Purchasing Review - 110140	Owain Snyder		Assign
Purchasing Review - 110150	Owain Snyder		Assign
Purchasing Review - 110181	Owain Snyder		Assign
Purchasing Review - 110500	Owain Snyder		Assign
Purchasing Review - 110501	Owain Snyder		Assign
Purchasing Review - 110502	Owain Snyder		Assign
Purchasing Review - 120300	Owain Snyder		Assign
Purchasing Review - 121101	Owain Snyder		Assign
Purchasing Review - 131000	Owain Snyder		Assign
Purchasing Review - 131100	Owain Snyder		Assign
Purchasing Review - 131200	Owain Snyder		Assign
Purchasing Review - 131210	Owain Snyder		Assign
Purchasing Review - 131220	Owain Snyder		Assign

Assign Substitute To All Requisitions Folders

End Substitute for All Requisitions Folders

Substitution Actions

1

The far-left column shows the folders that can be assigned

2

Each folder can be assigned individually with the Assign buttons

3

The boxes can be checked to assign multiple folders to a substitute approver at once

4

When all desired boxes are checked, click Substitution Actions, then Assign Substitute to Selected Folders

5

These two buttons can be used to assign substitute approvers and end substitution for all folders at once

Check the box to
Set the Date
Range for the
Substitution

Type in the
substitute
approver's name,
and click the name
when you find it

The screenshot shows a dialog box titled "Assign Substitute" with a close button (X) in the top right corner. Below the title bar, there is a checkbox labeled "Include Date Range for Substitution" which is checked. Underneath, there are three input fields: "Substitute Name" with a search icon and the placeholder text "Type to filter..."; "Start Date" with a calendar and clock icon and the placeholder text "mm/dd/yyyy hh:mm a"; and "End Date" with a calendar and clock icon and the placeholder text "mm/dd/yyyy hh:mm a". At the bottom of the dialog, there is a legend for the asterisk (*) indicating "Required", and two buttons: "Assign" (highlighted in purple) and "Close".

Set the Date range
by clicking the
calendar and
clock icons

Click Assign to finish
assigning a substitute
approver