

Step-by-Step Guide

Assigning Substitute Approvers



In This Guide

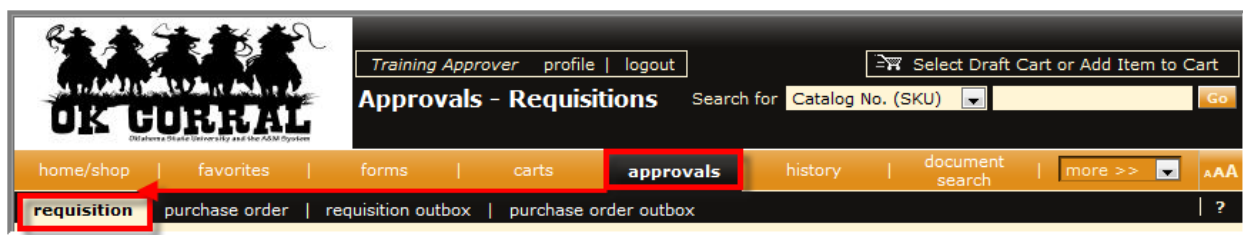
- ✓ Assigning substitute approvers
- ✓ Ending substitute approvers

If an approver will be absent or will not have access to OK Corral, he/she can designate another approver as their substitute. The substitute is able to review documents routed to the original approver. Substitutes are assigned at the folder level from the requisition or invoice approvals page.

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

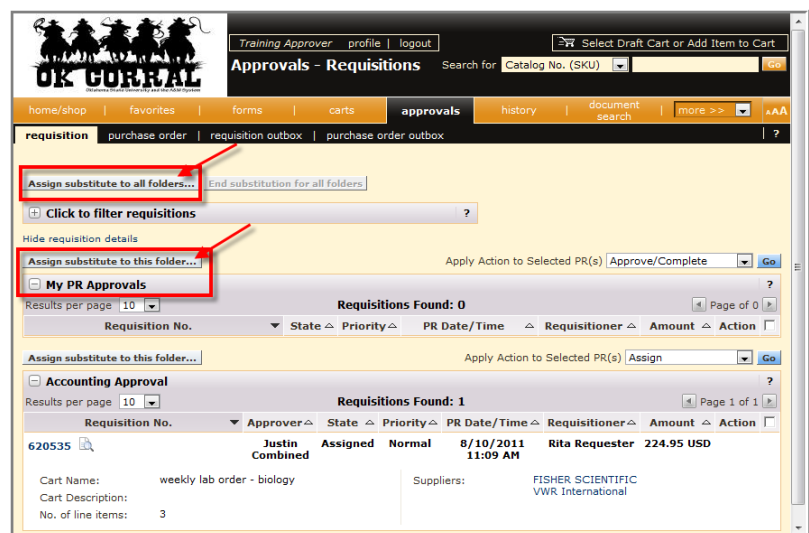
Procedure

1. Navigate to requisition or invoice approvals, by selecting **approvals** ⇒ **requisition** or **approvals** ⇒ **invoice**.



- ▲ The **Assign substitute to all folders** button will assign the selected substitute to each of your approval folders.
- ▲ The **Assign substitute to this folder** button will assign the selected substitute to the specific folder.

2. Determine which folder(s) you would like to set up a substitute approver for and follow the directions below.
3. Click on the desired **Assign Substitute** link.



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- From the **User Search** popup window, enter the criteria to find 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. Once the user criteria are entered, click the **Search** button.

- Click the **[select]** button to assign that individual as the substitute.

Name	User Name	Email	Phone	Action
Approver, Accounting	accountaprover	jdiana@scquest.com		[select]
Approver, Adam	adamaapprove	jdiana@scquest.com		[select]
Approver, Adam	adam_approver	dj_mckee@bellsouth.net		[select]

- The substitute selected now displays in the **Current Substitute** field.

- Click the **End Substitution** link to remove the substitution setting.

You have successfully assigned and unassigned a substitute approver.