Objective

The purpose of this document is to provide the process to assign substitute approvers for invoices in BobcatBUY. In an approver’s absence, a substitute approver can be assigned to approve invoices on their behalf. Please note, the approval process for requisitions is now maintained by CFAOs through Financial Approvers and Related Metadata System (FARM), so BobcatBUY will no longer permit users to add substitute approvers for requisition approval folders.

Assign Approvers for Requisitions/POs

Approval levels by organization for all requisitions are maintained by the Planning Unit CFAO. If changes need to be made to these approval levels, please contact your CFAO. Training materials are available on the Financial Approvers webpage.

Assign Substitute Approvers for Invoices

There are two available options to assign Substitute Approvers in BobcatBUY.

Using the Accounts Payable Icon

1. Select the Accounts Payable Icon on the left navigation of the homepage.
2. In the Accounts Payable box, select Approvals from the menu items, then select Assign Substitute Approvers – Invoices.
3. Select the check box to the right of My Invoice Approvals.
4. Click the arrow in the Substitution Actions box, then select Assign Substitute to Selected Folders.
5. If you would like to select a specific date range, select the check box next to Include Date Range for Substitution.
6. Type in the last name of the substitute approver in the box provided. All eligible users will be available in this search.

7. Select a start and end date, then press Assign to finish the process.

**Using the User Profile**

1. Select the Arrow next to your name in the upper right corner, and select View My Profile from the drop-down menu.

2. On the left menu, select the arrow next to Ordering and Approval Settings, and select View Assigned Approval Folders.

3. In the Refine Search Results box, under Type, select Invoice from the drop-down menu.
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4. Select the check box next to **My Invoice Approvals**, then press **Go**.

5. If you would like to select a specific date range, select the check box next to “Include Date Range for Substitution”.

6. Type in the last name of the substitute approver in the box provided. All eligible users will be available in this search.

7. Select a start and end date, then press **Assign** to finish the process.

**Important Note:** This process is not for users who have left the university. The Purchase Order Owner needs to be changed to the new user if an individual has left the university. Please reach out to Finance Customer Care at financecustomercare@ohio.edu to update the PO Owner.