

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

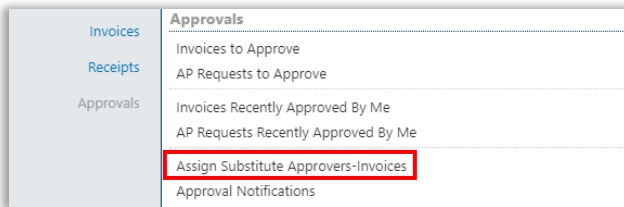
Approval levels by organization for all requisitions are maintained by the Planning Unit CFAO. If changes need to be made to these approval levels, please contact your CFAO. Training materials are available on the [Financial Approvers](#) webpage.

Assign Substitute Approvers for Invoices

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

Using the Accounts Payable Icon

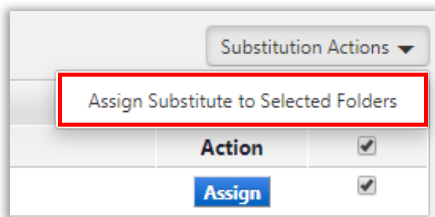
1. Select the Accounts Payable Icon on the left navigation of the homepage. 
2. In the Accounts Payable box, select **Approvals** from the menu items, then select **Assign Substitute Approvers – Invoices**.



3. Select the check box to the right of **My Invoice Approvals**.

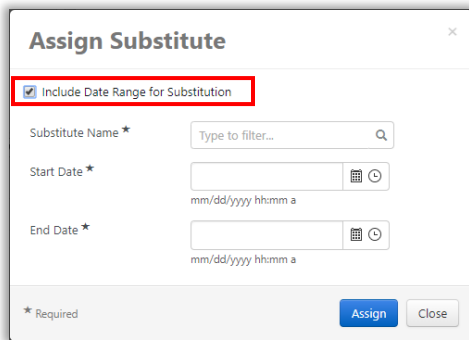


4. Click the arrow in the **Substitution Actions** box, then select **Assign Substitute to Selected Folders**.



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

BobcatBUY – Assign Substitute Approvers

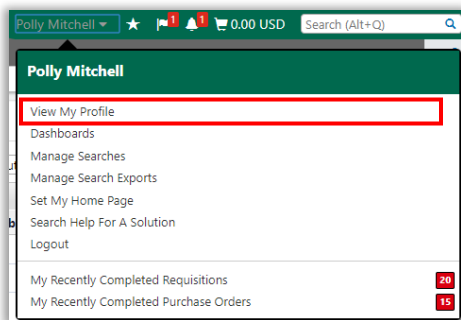


The 'Assign Substitute' dialog box features a title bar with a close button. Below the title, there is a checked checkbox labeled 'Include Date Range for Substitution'. The main area contains three required fields: 'Substitute Name' with a search input field, 'Start Date' with a date picker, and 'End Date' with a date picker. Both date pickers show the format 'mm/dd/yyyy hh:mm a'. At the bottom, there is a legend for the asterisk symbol, and two buttons: 'Assign' and 'Close'.

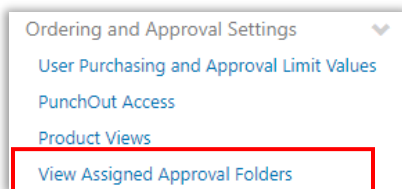
6. Type in the last name of the substitute approver in the box provided. All eligible users will be available in this search.
7. Select a start and end date, then press **Assign** to finish the process.

Using the User Profile

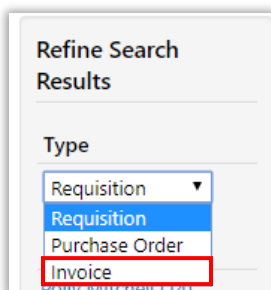
1. Select the Arrow next to your name in the upper right corner, and select **View My Profile** from the drop-down menu.



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

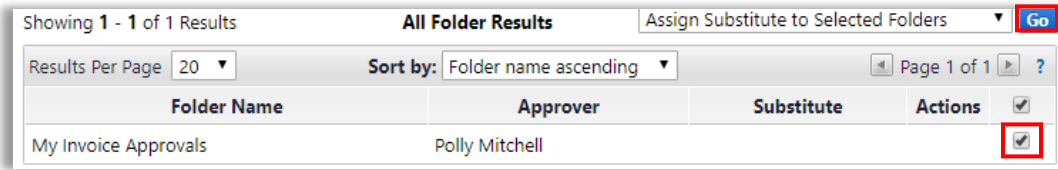


3. In the Refine Search Results box, under Type, select **Invoice** from the drop-down menu.



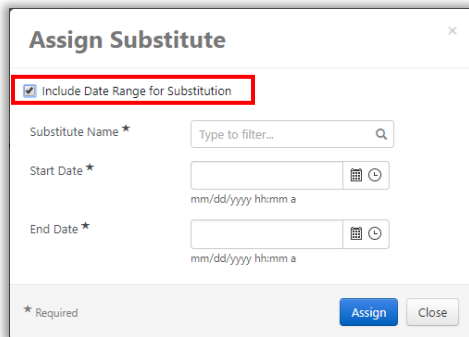
BobcatBUY – Assign Substitute Approvers

4. Select the check box next to **My Invoice Approvals**, then press **Go**.



Folder Name	Approver	Substitute	Actions
My Invoice Approvals	Polly Mitchell		<input checked="" type="checkbox"/>

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



Assign Substitute

Include Date Range for Substitution

Substitute Name *

Start Date *

End Date *

* Required

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.