From: PCBO Subscription
To: pcbodist@coyote.csusm.edu
Subject: [Pcbodist] Assigning a Substitute Approver in CSUBUY P2P
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Assigning a Substitute Approver in CSUBUY P2P

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Sent on behalf of: Procurement & Contracts

Hello PCBO,

With the Spring and Summer holidays quickly approaching, we wanted to send a reminder on how to assign a substitute approver in CSUBUY P2P while you are out of office.

To ensure that your P2P Workflow approvals are handled while you are out of office, please remember to assign a substitute approver for all of your approval roles (DOA, compliance, etc.). Best practice is to assign a substitute approver before your planned time off, so that a requisition does not sit in Workflow until you return. The substitute should have the same DOA/Permission set up for your approval step. If you are a requester, please share this information with your approvers.

To assign a substitute approver, follow these steps once logged into P2P:

1. **Navigate to the Substitute Approver Section**
    - Go to Orders > Approvals > Assign Substitute Approvers.
2. **Choose Assignment Options**
    - For a single folder: Select the Assign button.
    - For multiple folders: Check the boxes next to the folders, then select Assign Substitute to Selected Folders from the Substitution Actions drop-down menu.
    - For all folders for the selected user: Click Assign Substitute To All Folders.

3. **Select the Substitute Approver**
    - In the Assign Substitute module window, type the name of the approver in the Substitute Name field. Select the desired user from the list.
4. **Set the Date Range**
    - Check the box for Include a Date Range for Substitution and enter the start and end dates.
5. **Finalize Assignment**
    - Click the Assign button to complete the process.
6. **Ending the Substitution**
    - For a single folder: Select Remove from the Substitution Actions drop-down menu.
    - For multiple folders: Check the boxes next to the folders, then select Remove Substitute for Selected Folders from the Substitution Actions drop-down menu.
    - For all folders: Select End Substitute for All Vouchers Folders

Thank you.
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