

Assigning Substitute Approvers



Overview

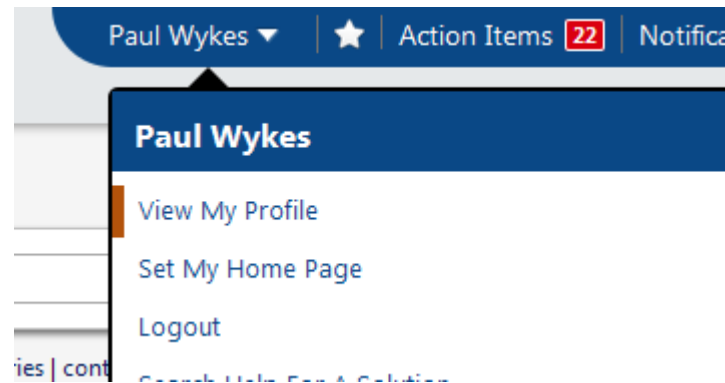
SmartBuy Plus provides the option to assign a substitute approver while you are on vacation or out of the office. You can schedule the timeframe for the substitution to be in effect. Please note that the person you are assigning must already be configured as an Approver within SmartBuy Plus.

The first step is to log into SmartBuyPlus.clarku.edu using your Clark credentials.

*Please note that these slides were made using the SmartBuy Plus test site.
The primary colors in the actual site will be red instead of blue.*

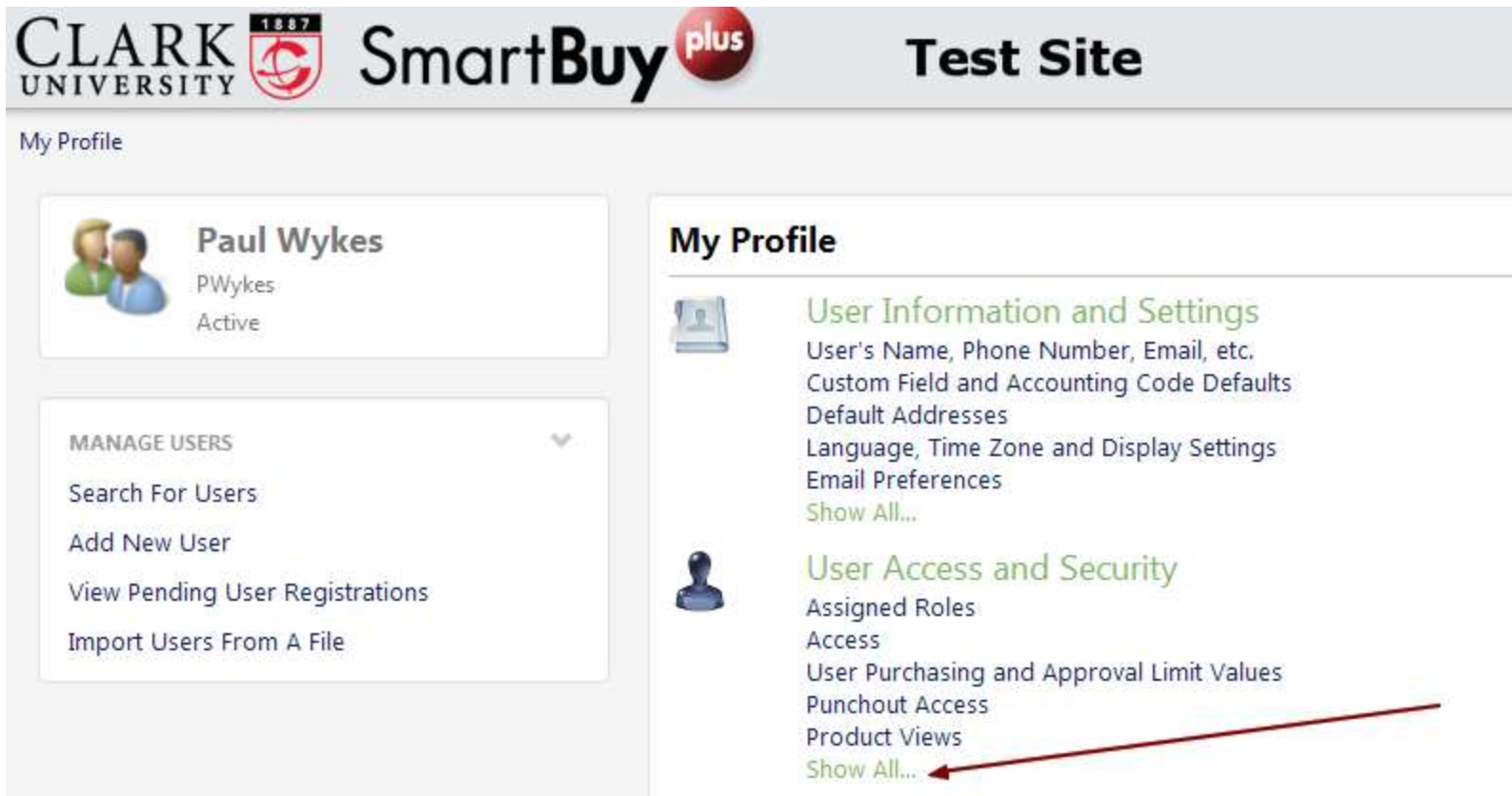
Step 1 - View your profile

Click on your name, which is displayed towards the top right hand side of the screen and then select “View My Profile”.



Step 2

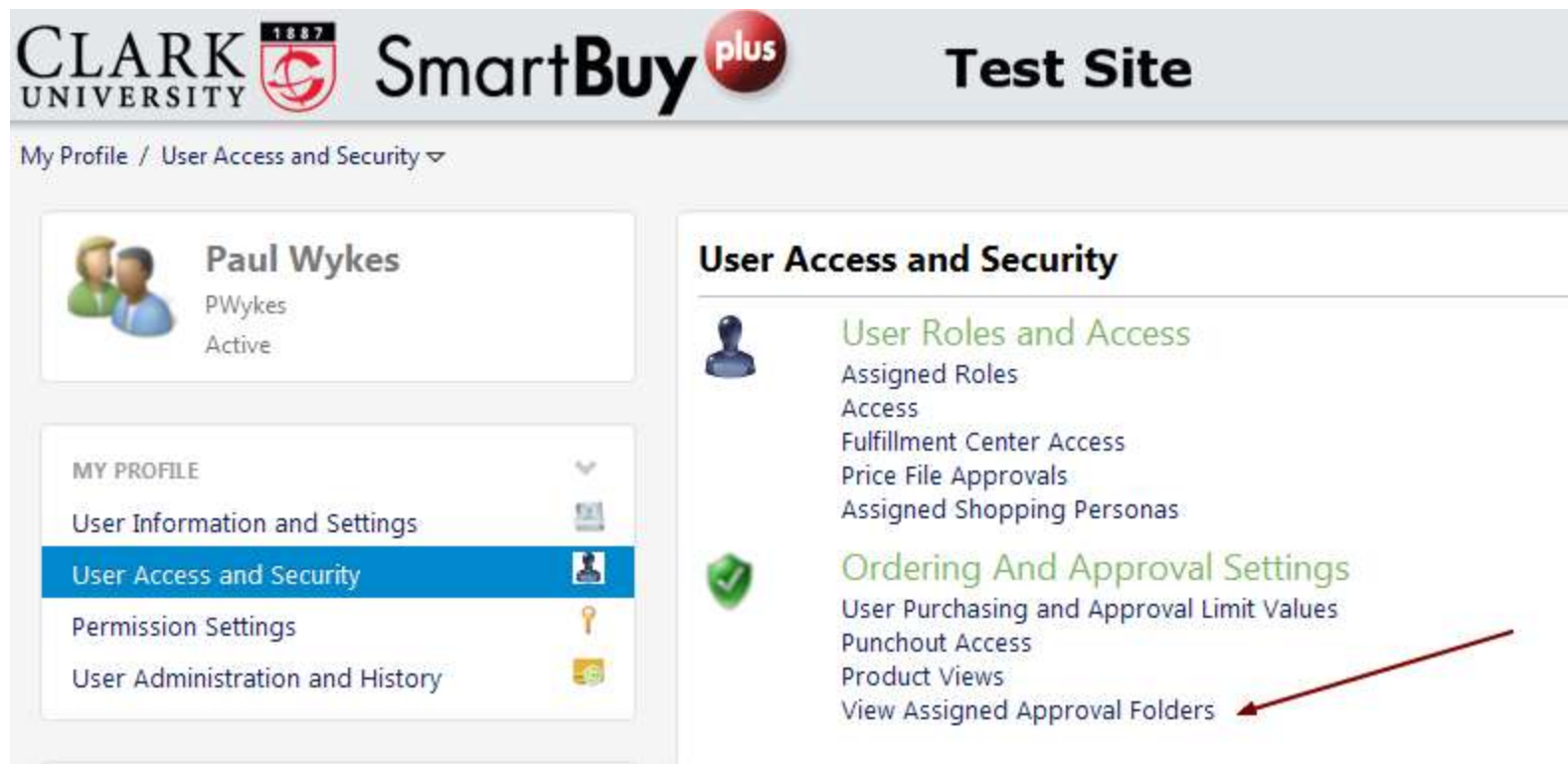
Click “Show All” under the “User Access and Security” section.



The screenshot displays the SmartBuy plus Test Site interface. At the top left is the Clark University logo. The main header area contains the text "SmartBuy plus" and "Test Site". Below the header, the page is titled "My Profile". On the left side, there is a user profile card for Paul Wykes, with the name "Paul Wykes", email "PWykes", and status "Active". Below this card is a "MANAGE USERS" section with a dropdown arrow, containing the following options: "Search For Users", "Add New User", "View Pending User Registrations", and "Import Users From A File". On the right side, there is a "My Profile" section with two main categories: "User Information and Settings" and "User Access and Security". The "User Information and Settings" category includes: "User's Name, Phone Number, Email, etc.", "Custom Field and Accounting Code Defaults", "Default Addresses", "Language, Time Zone and Display Settings", "Email Preferences", and a "Show All..." link. The "User Access and Security" category includes: "Assigned Roles", "Access", "User Purchasing and Approval Limit Values", "Punchout Access", "Product Views", and a "Show All..." link. A red arrow points to the "Show All..." link under the "User Access and Security" section.

Step 3


Select “View Assigned Approval Folders”



The screenshot displays the user interface for the SmartBuy plus Test Site. At the top left, the Clark University logo and the SmartBuy plus logo are visible. The page title is "Test Site". Below the header, the user's profile is shown as "Paul Wykes" (PWykes, Active). A navigation menu on the left includes "MY PROFILE", "User Information and Settings", "User Access and Security" (highlighted in blue), "Permission Settings", and "User Administration and History". The main content area is titled "User Access and Security" and contains two sections: "User Roles and Access" (with a person icon) and "Ordering And Approval Settings" (with a shield icon). The "Ordering And Approval Settings" section lists several options, with "View Assigned Approval Folders" highlighted by a red arrow.


CLARK UNIVERSITY 1887 SmartBuy plus Test Site


My Profile / User Access and Security ▾

 **Paul Wykes**
PWykes
Active

MY PROFILE ▾
User Information and Settings
User Access and Security
Permission Settings
User Administration and History

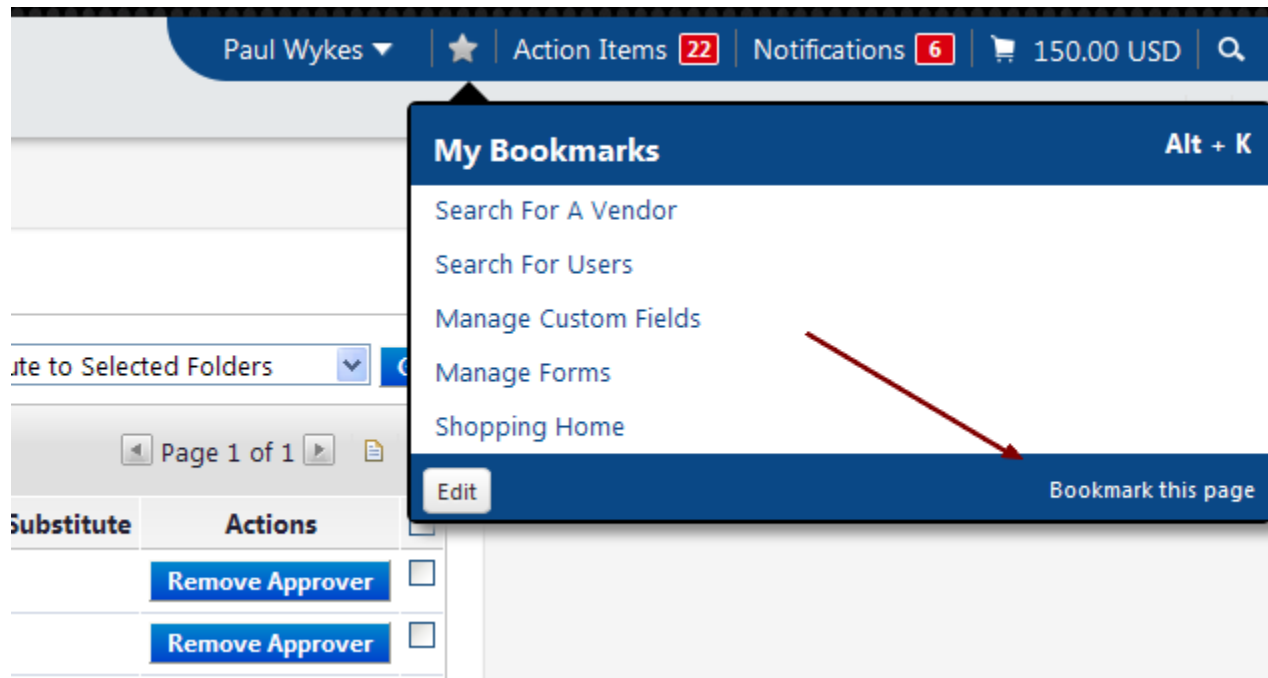
User Access and Security

 **User Roles and Access**
Assigned Roles
Access
Fulfillment Center Access
Price File Approvals
Assigned Shopping Personas

 **Ordering And Approval Settings**
User Purchasing and Approval Limit Values
Punchout Access
Product Views
View Assigned Approval Folders

Bookmark Tip

You may want to bookmark this page so you can skip the previous steps in the future. To do so, click on the star that appears next to your name and then click on “Bookmark this page”. In the future, you can then click on the star and then select “View Assigned Approval Folders” from your list of Bookmarks.



Step 4

At this screen, you may see one or more “Folder Names” listed. Select the checkbox to the right of “Actions” to select all your folders. Be sure “Assign Substitute to Selected Folders” appears in the dropdown box and then click the blue “Go” button.

View Assigned Approval Folders

Showing 1 - 9 of 9 results All Folder Results Assign Substitute to Selected Folders Go

Results per page: 20 Sort by: Folder name ascending Page 1 of 1

| Folder Name | Approver | Substitute | Actions | <input checked="" type="checkbox"/> |
|-------------------------------------------------------|------------|------------|-----------------|-------------------------------------|
| Account Code Verification | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| Business Manager:(All Values) | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| Department: Academic Advancement (2900): (All Values) | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| Department: Physics (4460): (All Values) | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| EH&S Notification 1 | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| Grant Reimbursement Request:(All Values) | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| InitialWaitForPRAApprovals | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |
| My PR Approvals | Paul Wykes | | | <input checked="" type="checkbox"/> |
| New Supplier:(All Values) | Paul Wykes | | Remove Approver | <input checked="" type="checkbox"/> |


Results per page: 20 Page 1 of 1

Filtered By
Type: Requisition

Refine Search Results ?

Type
Requisition

Approver
Paul Wykes (9)





Step 5

Click on the checkbox to the left of “Include Date Range for Substitution”. Start typing the name of the substitute in the “Substitute Name” box and his/her name should appear. Enter the dates and times in the appropriate box and click “Assign”.

The screenshot shows the 'View Assigned Approval Folders' interface. The main table displays a list of folders with columns for Folder Name, Approver, Substitute, and Actions. The 'Assign Substitute' dialog box is open, showing the following fields:

- Include Date Range for Substitution (indicated by a red arrow)
- Substitute Name:
- Start Date: 08/12/2013 (mm/dd/yyyy) and noon (time)
- End Date: 08/13/2013 (mm/dd/yyyy) and noon (time)

The dialog box has 'Assign' and 'Cancel' buttons at the bottom.

Removing Substitutes

To un-assign substitutes, complete the first 4 steps above (also see Bookmark Tip slide), then select “Remove Substitute From Selected Folders” and click the blue “Go” button.

View Assigned Approval Folders

Showing 1 - 9 of 9 results All Folder Results Assign Substitute to Selected Folders Go

Results per page: 20 Sort by: Folder name asc Remove Substitute From Selected Folders ?

| Folder Name | Approver | Substitute | Actions | |
|-------------------------------------------------------|------------|------------|-----------------|---|
| Account Code Verification | Paul Wykes | | Remove Approver | ✓ |
| Business Manager:(All Values) | Paul Wykes | | Remove Approver | ✓ |
| Department: Academic Advancement (2900): (All Values) | Paul Wykes | | Remove Approver | ✓ |
| Department: Physics (4460): (All Values) | Paul Wykes | | Remove Approver | ✓ |
| EH&S Notification 1 | Paul Wykes | | Remove Approver | ✓ |
| Grant Reimbursement Request:(All Values) | Paul Wykes | | Remove Approver | ✓ |
| InitialWaitForPRApprovals | Paul Wykes | | Remove Approver | ✓ |
| My PR Approvals | Paul Wykes | | | ✓ |
| New Supplier:(All Values) | Paul Wykes | | Remove Approver | ✓ |

Results per page: 20 Page 1 of 1

Filtered By
Type: Requisition

Refine Search Results ?

Type
Requisition

Approver
Paul Wykes (9)



Please contact
pwykes@clarku.edu
if you have any
questions.

