Caltech
Procurement Services

How to assign a TechMart substitute approver:

Below are instructions and considerations for setting up a substitute approver in TechMart. This process is essential when an approver is unavailable due to vacation, leave, or other absences. Without assigning a substitute, requisitions and invoice processing may be delayed, impacting overall processing time.

For Invoices:

1. Click the *Accounts Payable* icon on the left side bar, then *Approvals*

2. Select *Assign Substitute Approver - Vouchers*

3. Select the folders you want to assign and under the *Substitution Actions* drop down, click *Assign Substitute to Selected Folders* or select the blue button at the top

   Assign Substitute to All Vouchers Folders

4. In the pop-up window, check the box that states, "Include Date Range for Substitution," enter the Substitute Approver's name and the start and end dates for the temporary substitution

5. Click *Assign*.

For Reqs:

1. Click the *Orders* icon on the left side bar, then *Approvals*

2. Select *Assign Substitute Approvers - Requisitions*

3. Select the folders you want to assign and under the Substitution Actions drop down, click *Assign Substitute to Selected Folders* or select the blue button at the top

   Assign Substitute To All Requisitions Folders

4. In the pop-up window, check the box that states, "Include Date Range for Substitution," enter the Substitute Approver's name and the start and end dates for the temporary substitution

5. Click *Assign*.

<u>Things to consider:</u>

- Substitute Approver must have an Approver Role and Limit (for Reqs and/or Invoices)

- Substitute Approver must have an Approval Limit higher than those for whom he/she will temporarily approve

- Substitute Approver cannot be someone for whom <u>you</u> are their default approver...otherwise, transactions will get caught in a loop.

If you decide not to add a date range and want to remove the substitution manually, go through steps 1-2, and then select *End Substitute for All Requisitions/Vouchers Folder* button at the top of the screen.

For assistance, contact the Procurement Hotline at (626) 395-8900 or email **procurementhotline@caltech.edu**.