

Approver Settings FAQs

This **Grab & Go** covers when to use the various approval settings available to financial approvers.

ALTERNATE APPROVER

Essentially acts a “clone” of the original approver

- Receives the **same** email notifications and can perform the **same actions** as the original
- “Inherits” the same attributes as the original, including approval levels and next approver
- Requisition and approval status show up in both user’s approval queues

When to Use:

- ✓ A long-term “back-up” or “second contact” for approvals
- ✓ Coverage for unplanned availability
- ✓ Minimizes maintenance activity

Need to Know Info:

- ✓ Creates a scenario where both users can attempt the same action
- ✓ Requisitions show up in both users’ queues
- ✓ Changes affect only newly created documents, not previously existing ones
- ✓ Settings are performed and visible only within the approver’s profile

OUT OF OFFICE

A temporary process that forwards emails/actions to another user

- Retains same roles/privileges as initially set for a limited time period
- Easy to set and control; automatically expires

When to Use:

- ✓ Short term need

Need to Know Info:

- ✓ Changes affect only newly created documents, not previously existing ones
 - ✓ The settings are performed and visible only within your own profile
 - ✓ Automatically expire and reset upon date completion
 - ✓ Alternate and OOO together are not compatible
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NEXT STEPS

- ✓ **Review** your current approver levels/flow
 - Next approver, fallback approver, auto-forward timeframe
- ✓ **Inform** your Alternate or OOO approver of your settings