

MacBuy User Profile Guide

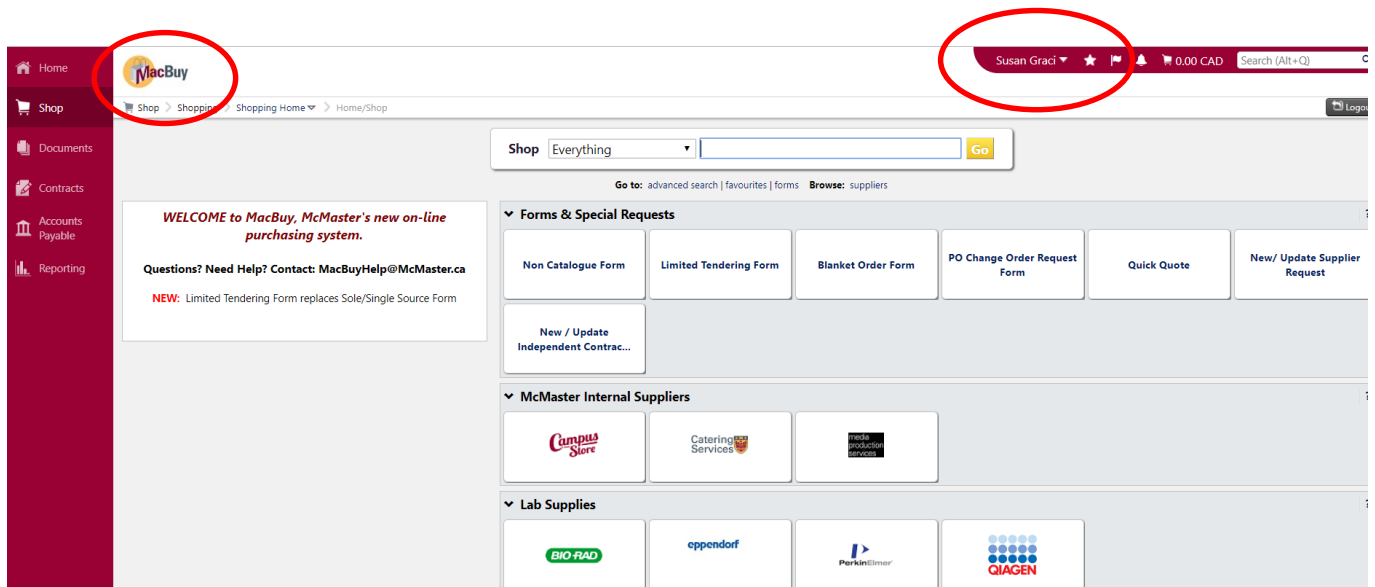
In MacBuy the User can edit their profile so that Business Unit, VAT Treatment (taxes), delivery location(s) and chart field string(s) are easily accessible. Defaults can also be set to make the experience more user friendly and intuitive.

MacBuy can be set up to send as many or as few email notifications as each User would like.

All edits are done under the User's Profile, upper right Notification bar, below.

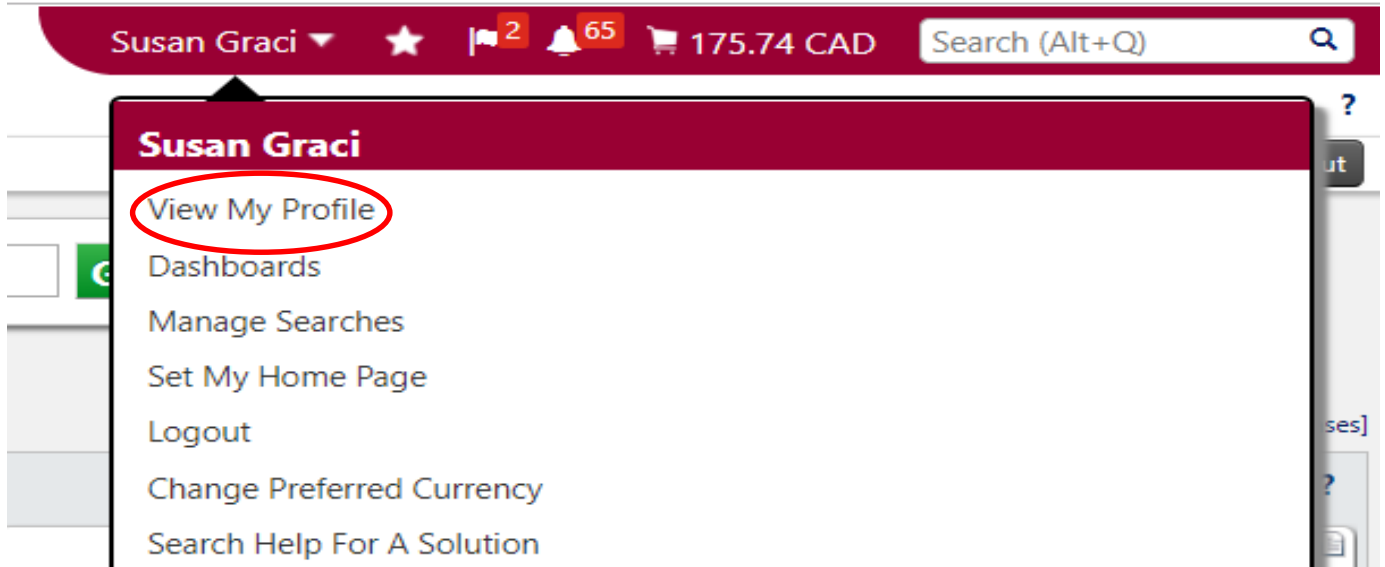
Log into MacBuy using the MacBuy tile in Mosaic. It will be on the Home or My Work screen.

Home page



The screenshot shows the MacBuy home page interface. The top navigation bar includes the MacBuy logo (circled in red) and the user's name 'Susan Graci' (circled in red) along with a star icon, a notification bell, and the currency '0.00 CAD'. Below the navigation bar is a search bar with a 'Go' button. The main content area is divided into several sections: a welcome message, a 'Forms & Special Requests' section with buttons for 'Non Catalogue Form', 'Limited Tendering Form', 'Blanket Order Form', 'PO Change Order Request Form', 'Quick Quote', and 'New/ Update Supplier Request'; a 'McMaster Internal Suppliers' section with logos for 'Campus Store', 'Catering Services', and 'Media Production Services'; and a 'Lab Supplies' section with logos for 'BIO RAD', 'eppendorf', 'PerkinElmer', and 'QIAGEN'.

Click on your name in the Notifications tool bar, upper right of home screen.



Select **View My Profile** from the drop down menu options.


View My Profile allows the user to add information such as chart field strings, tax treatment and delivery location. This reduces time and key strokes on requisitions.

TIP: Pre-populated information comes from Human Resources. Some fields cannot be edited.

Susan Graci

User Name graci

- User Profile and Preferences >
- Default User Settings >**
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

 My Profile > User's Name, Phone Number, Email, etc. ▾

Susan Graci

User Name graci

User's Name, Phone Number, Email, etc.

- User Profile and Preferences ▾
- User's Name, Phone Number, Email, etc.**
- Language, Time Zone and Display Settings
- Early Access Participation
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

First Name


Last Name

Phone Number

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address ★ 

Department

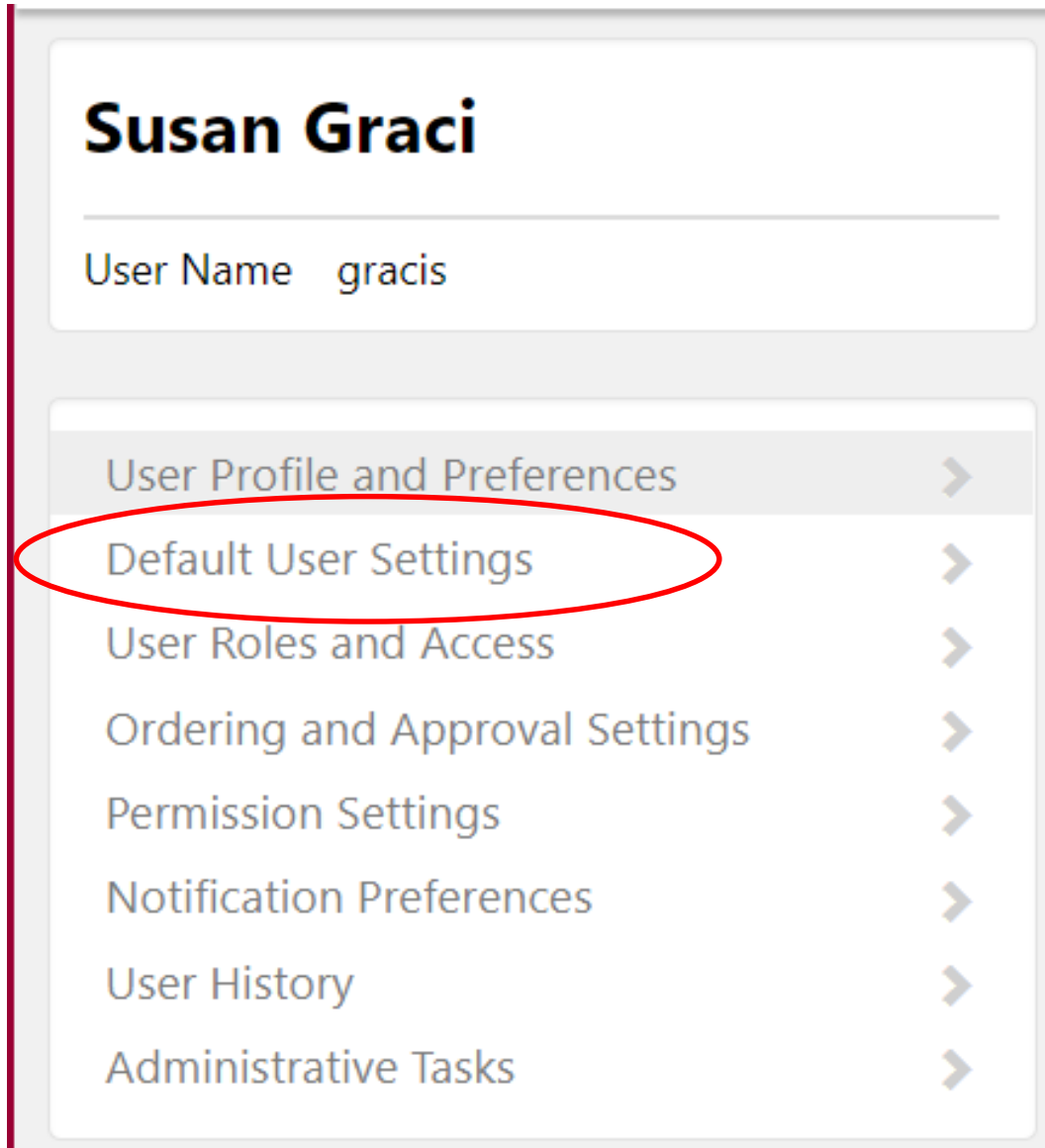
Position

User Name ★ graci

User's name, phone number, email, etc. - confirm or enter email address, work extension and personal phone number.

Default User Settings

Allows user to save frequently used chart field strings, Business Units, tax treatments, shipping locations etc. to their profile for quick selection while creating requisitions.



Susan Graci

User Name gracis

- User Profile and Preferences >
- Default User Settings >**
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Susan Graci

User Name graci

- User Profile and Preferences >
- Default User Settings >
 - Custom Field and Accounting Code Defaults**
 - Default Addresses
 - Cart Assignees
 - Checkout Settings
 - Financial Approvers
 - Payment Options
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
Blanket/Service Order	No Default Value		Edit
Purchasing BU	No Default Value		Edit
VAT Treatment	No Default Value		Edit

Tip: there are no default values set. They can be set as default values and updated at the requisition level if necessary. If more than one chart field string is used, it is **not** recommended that a default be assigned.

Purchasing Business Unit

Click on Purchasing BU **Edit** button.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
Purchasing BU	No Default Value		Edit


Edit Values Close

Create New Value

Value	Description
-------	-------------

Click the **Create New Value** button to see all Business Units.

Custom Field Name	Default Value	Description	Edit Values
Purchasing BU	No Default Value		<input type="button" value="Edit"/>

 Edit Values

Value	Description

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.


Values ?	
<input type="checkbox"/>	Value Description
<input type="checkbox"/>	DIV01 Divinity College
<input type="checkbox"/>	EXHAH Academic HS Org
<input type="checkbox"/>	EXHALL Allergen
<input type="checkbox"/>	EXHAP Hamilton Academic Pediatric A
<input type="checkbox"/>	EXOTH Other External Entities
<input type="checkbox"/>	EXPER Pediatric ER
<input type="checkbox"/>	EXRMA Regional Medical Association
<input checked="" type="checkbox"/>	MAC01 MAC01

Check box beside correct Business Unit.

Click **Add Values** box.

TIP: at this point there are no values in the box to the left side of the screen.

Custom Field Name	Default Value	Description	Edit Values
Purchasing BU	No Default Value		Edit

 Edit Values

[Close](#)

[Create New Value](#)

Value	Description
MAC01	MAC01

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Values		?
<input type="checkbox"/>	Value	Description
<input type="checkbox"/>	DIV01	Divinity College
<input type="checkbox"/>	EXHAH	Academic HS Org
<input type="checkbox"/>	EXHALL	Allergen
<input type="checkbox"/>	EXHAP	Hamilton Academic Pediatric A
<input type="checkbox"/>	EXOTH	Other External Entities
<input type="checkbox"/>	EXPER	Pediatric ER
<input type="checkbox"/>	EXRMA	Regional Medical Association

[Add Values](#)

TIP: A Business Unit is now in the box to the left, above.

Click on the **Business Unit** that has appeared. This is a hyper link, although it does not readily appear to be one.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
Purchasing BU	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
MAC01	MAC01

Edit Existing Value ?

Value

Description

Default

Status active

Save Remove

Check the default box and then click the **Save** button. Then click **Close** button.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
Blanket/Service Order	No Default Value		Edit
Purchasing BU	MAC01	MAC01	Edit
VAT Treatment	No Default Value		Edit

TIP: The Purchasing BU Default is now populated.


VAT Treatment

Custom Field and Accounting Code Defaults

Header (int.)			
Codes		Code Favorites	
Custom Field Name	Default Value	Description	Edit Values
Blanket/Service Order	No Default Value		Edit
Purchasing BU	MAC01	MAC01	Edit
VAT Treatment	No Default Value		Edit

Click the VAT Treatment **Edit** button.

Header (int.)			
Codes		Code Favorites	
Custom Field Name	Default Value	Description	Edit Values
VAT Treatment	No Default Value		Edit

 Edit Values [Close](#)

[Create New Value](#)

Value	Description
-------	-------------

Click on the **Create New Value** button.

Header (int.) Codes Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
VAT Treatment	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
-------	-------------

* Custom Field Values

Search For Value ?

Field Name VAT Treatment

Value

Description

Results Per Page 5

Search

Click the **Search** button.

All possible VAT combinations across Canada are listed in MacBuy.

TIP: Taxes follow the goods or service. If an item is delivered to Ontario the VAT will be Ontario VAT.

Edit Values Close

Create New Value

Value	Description

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results Per Page: 5

Values Found 92 Page 1 of 19 ?

Select	Value	Description
<input checked="" type="checkbox"/>	Ontario - HST	Ontario - HST
<input type="checkbox"/>	Ontario - GST/HST Exempt	Ontario - GST/HST Exempt
<input type="checkbox"/>	Ontario - 5% (GST)	Ontario - 5% (GST)
<input type="checkbox"/>	Ontario - Self-Assess 13% (HST) on Services	Ontario - Self-Assess 13% (HST) on Services
<input type="checkbox"/>	Ontario - Self-Assess 8% (OHST) on Goods	Ontario - Self-Assess 8% (OHST) on Goods

Add Values **Back to Search**

Select Ontario HST unless a specific tax situation applies to User. This can also be adjusted on the individual requisition or PO.

TIP: Add Ontario – Self-Assess 13% (HST) on Services and Ontario – Self-Assess 8% (OHST) on Goods to the profile for those instances where purchases are made outside of Canada. VAT must be paid on all purchases outside of Canada. Goods have 5% GST paid upon crossing the border to Canada so 8% Ontario Sales Tax (OHST) must still be paid through self-assessing. Services do not have anything tangible cross the border therefore the full 13% HST must be self-assessed. There is a separate guide on self-assessing in MacBuy available.

Header (int.) Codes Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
VAT Treatment	No Default Value		Edit

Edit Values [Close](#)

[Create New Value](#)

Value	Description
Ontario - HST	Ontario - HST

Results Values Found 91 Page 1 of 19 ?

Per Page 5

Select	Value	Description
<input type="checkbox"/>	Ontario - GST/HST	Ontario - GST/HST Exempt

Click on **Ontario - HST** (this is a hyper link) to open more options, including the default box.

Custom Field Name	Default Value	Description	Edit Values
VAT Treatment	No Default Value		Edit

Edit Values [Close](#)

[Create New Value](#)

Value	Description
Ontario - HST	Ontario - HST

Edit Existing Value ?

Value

Description

Default

Status active

[Save](#) [Remove](#)

Check box beside default. **Save. Close.**

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Blanket/Service Order	No Default Value		Edit
Purchasing BU	MAC01	MAC01	Edit
VAT Treatment	Ontario - HST	Ontario - HST	Edit

Notice that the Purchasing BU and VAT Treatment are now completed as Default values. These can be edited on the requisition at the Header (affecting the entire order) or at the line (affecting only the line selected).

Chart Field Strings

Default user settings>custom field and accounting code defaults>

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites**

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

[Add](#)

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** Internal Information

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Chartfields

Business Unit	Fund	Account	Department	Program	PCBU	Project	Project Activity	Analysis Type	Resource Type	Open Item
<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>

Custom Field and Accounting Code Defaults

Chartfields

Nickname: Default

Business Unit	Fund	Account	Department	Program	PCBU	Project	Project Activity	Analysis Type	Resource Type	Open Item	add split
<input type="text" value="IMAC01"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>Select from profile values... Select from all values...</small>	<small>Select from profile values... Select from all values...</small>	<small>Select from profile values... Select from all values...</small>	<small>Select from profile values... Select from all values...</small>	<small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>

Code favourites tab>add>complete chart field string and enter nickname>save

Chartfields

Nickname Default

Business Unit	Fund	Account	Department	Program	PCBU
<input type="text" value="MAC01"/> Select from profile values... Select from all values...	<input type="text" value="20"/> Select from all values...	<input type="text"/> Select from all values...	<input type="text" value="10383"/> Select from all values...	<input type="text" value="30000"/> Select from all values...	<input type="text"/> Select from all values...

TIP: Account field can be left blank as it is tied to the item purchased.

TIP: Do not set any one chart field string as a Default unless only one chart field string is on a User's profile.

MacBuy

My Profile > Default Addresses ▾

Susan Graci

User Name gracis

- User Profile and Preferences >
- Default User Settings ▾
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Checkout Settings
- Financial Approvers
- Payment Options
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Default Addresses

Select an address to edit

Shipping Addresses

- A. N. BOURNS
- MILLS MEMORIAL LIBRARY
- ONE JAMES NORTH**

Select Address Template

Select Address Template

- A. N. BOURNS
- ART GALLERY
- BOOKSTORE
- CENTRAL ANIMAL
- CHARLTON MEDICAL CTR
- CHEDOKE HOSPITAL
- DAVID BRALEY RES INS
- DIRECT DELIVERY
- HAMILTON GENERAL HOSPITAL
- HEALTH CAMPUS
- HSC FORSYTH
- IHB INT HEALTH
- INST FOR APPLIED HEALTH
- JURAVINSKI CANCER CENTRE
- JURAVINSKI CTR INT HEALTH
- JURAVINSKI HOSPITAL
- M DEGROOTE CTR LEARN
- MATERNITY CENTRE
- MCMASTER AUTO RES CTR

Default user settings>default addresses>create Ship To address favourite(s): Select Address(es) for Profile>drop down menu for choice(s)>select and enter nickname(s)>save

Ship To Bill To

Select an address to edit

Select Addresses for Profile Delete Address

Shipping Addresses

ONE JAMES NORTH

Edit Selected Address

Nickname Windowless Bunker Building!

Default

Current Default Address ONE JAMES NORTH

ADDRESS

Fields with * are Required

ATTN: * Susan Graci

BLDG/ROOM: * T13 Room 111

Address Line 1 1280 Main St West

Address Line 2 MCMASTER-WEST CAMPUS RECV

City Hamilton

Province / State ON

Postal / Zip Code L8S 4M3

Country * Canada

Save

TIP: More than one address can be saved to a profile.

TIP: Limit entries to 40 characters per field or less.

TIP: Most main campus buildings not specifically listed would be West Campus on drop down menu.

Cart Assignees

Users with the Shopper role can add their Requester (person who actually Places Order, which puts the requisition into work flow) to their profile. This person will have knowledge of chart field strings, taxes, and delivery locations.

Susan Graci
User Name gracis

User Profile and Preferences >
Default User Settings v
Custom Field and Accounting Code Defaults
Default Addresses
Cart Assignees
Checkout Settings
Financial Approvers
Payment Options
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >

Cart Assignees

Add Assignee...

My Cart Assignees ?

Name	Action
------	--------

User Search

Last Name ?

First Name ?

User Name ?

Email ?

Role ?

Results Per Page

Search

Enter the name of the person who will be the Requester.

This does not mean that every requisition created will be assigned to that Requester. Each order can have a different Requester.

This option creates a drop down menu for easy selection when choosing the Requester for a requisition (shopping cart).

New Search

Name ▲	User Name ▲	Email ▲	Phone	Action
		wrightge@mcmaster.ca	+1 905-525-9140	[select]
Wright, Kari	wrihk18	wrihk18@mcmaster.ca	+1 905-525-9140 ext. 20645	[select]
		kwright@mcmaster.ca	+1 905-525-9140	[select]
		mwright@mcmaster.ca	+1 905-525-9140	[select]
		srankin@mcmaster.ca	+1 905-525-9140	[select]

Cart Assignees

Add Assignee...

My Cart Assignees ?

Name	Action
Kari Wright	Set as Preferred Remove

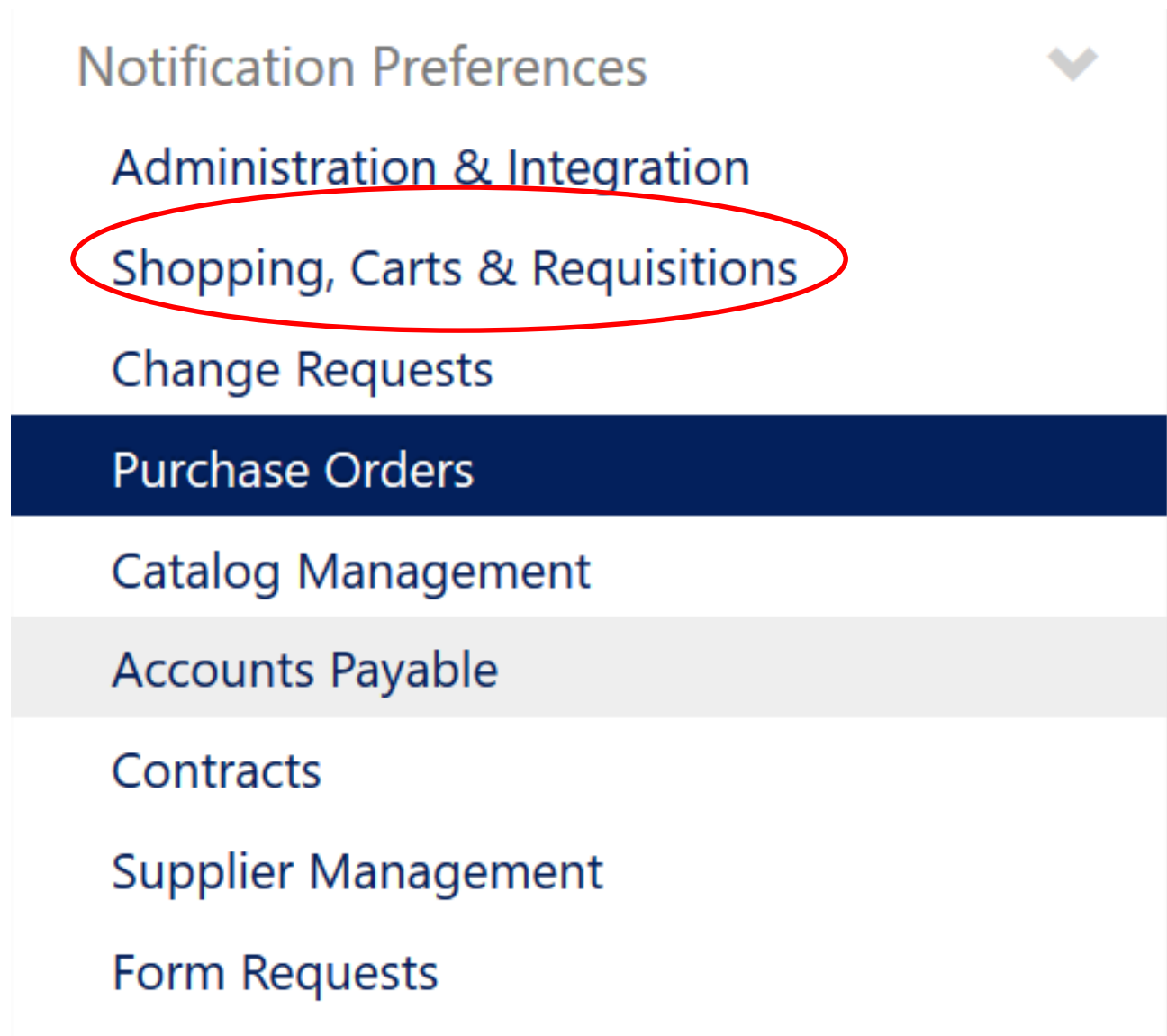
Cart Assignees

Add Assignee...

My Cart Assignees ?

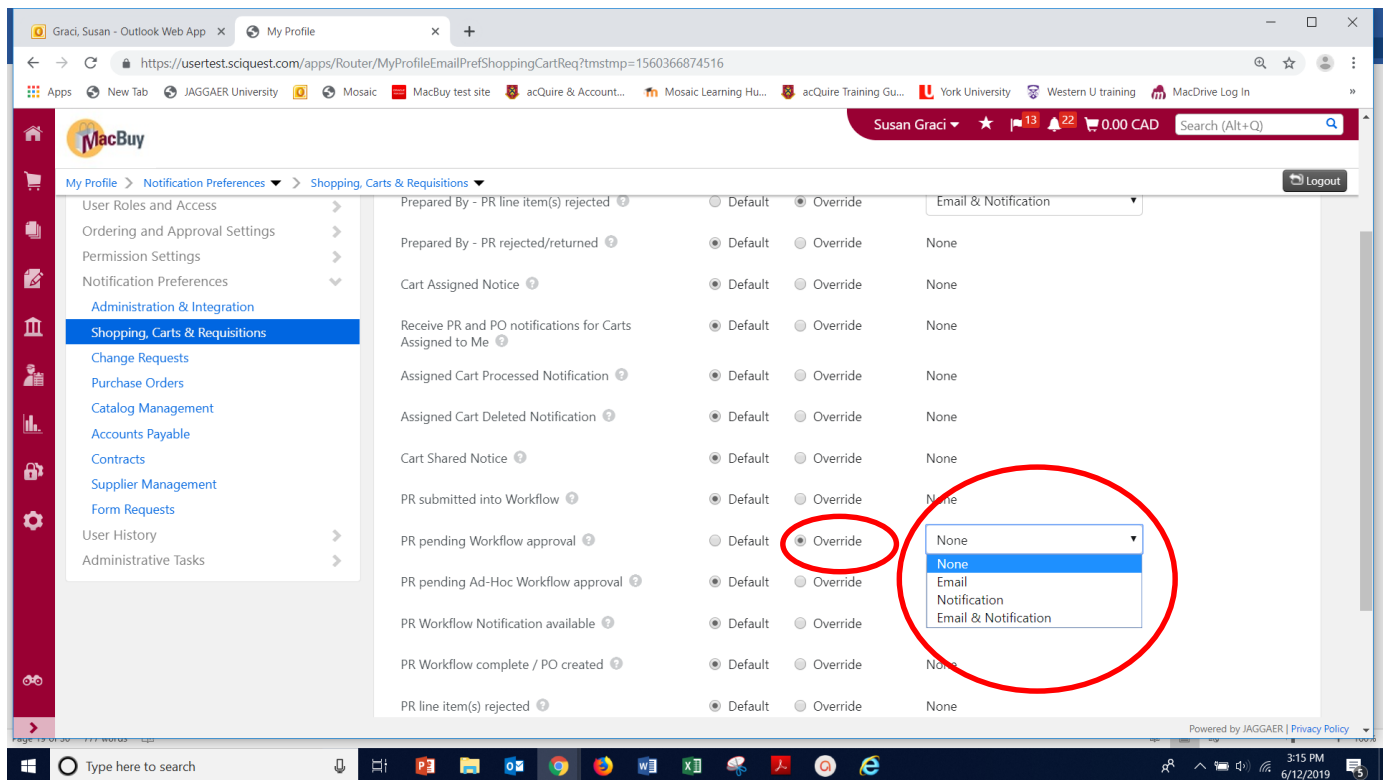
Name	Action
Kari Wright (Preferred Assignee)	Remove Preferred Remove

Changing Notification types and when to receive them



To customize notifications that will be received about Shopping, Carts & Requisitions, click on Shopping, Carts & Requisitions then edit.

TIP: Select Email and Notification to receive emails and have the flag in MacBuy used for notifying of items requiring action (i.e. approval).



Select when email notifications are sent.

Choices for receiving a notification are: none, email, notification (flag), or email AND notification (flag).

TIP: While MacBuy is a new process, retain the email notifications. Once a routine for working in MacBuy is established, the email notifications can be removed if they are not wanted.

Notification Preferences: Shopping, Carts & Requisitions

?

The in-application notifications are not yet available for all Email Notifications. ?

Prepared By - Cart Assigned Notice ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR line item(s) rejected ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR rejected/returned ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Cart Assigned Notice ?	<input type="radio"/> Default	<input checked="" type="radio"/> Override	
Receive PR and PO notifications for Carts Assigned to Me ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	
Assigned Cart Processed Notification ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	
Assigned Cart Deleted Notification ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Cart Shared Notice ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
PR submitted into Workflow ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None

None

None

Email

Notification

Email & Notification

Powered by JAGGAER | Privacy Policy



This User will be notified via email and by a notification flag in the Notification Tool Bar on the main screen in MacBuy, whenever a cart is assigned to him/her.

MacBuy

Susan Graci 6,437.60 CAD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Requisition

Shopping Cart for Susan Graci

Name this cart: 2019-03-14 gracis 06

Share my cart with others:

Have you made changes?

Grand & Toy Fulfillment Address 1 Po Box 5500, Don Mills, ON M3C 3L5 CA

The item(s) in this group was retrieved from the supplier's website. What does this mean?
Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 20/03/2019 2:56:48 PM

Product Description	Unit Price	Quantity	Total
Keurig Eccellenza Touch Bean-To-Cup Single Cup Coffee Maker KEURIG ECCELLENZA TOUCH	5,696.99	1	5,696.99
Part Number: 50-99016	EA		
Commodity Code: 52140000	GST/HST		740.61
Domestic appliances	Shipping		0.00
	Handling		0.00

Supplier subtotal: 6,437.60

Name the cart, complete Commodity Code if not auto filled, assign to Requester (Shopper role) or proceed to check out (Requester or Approver role). If Shopper knows chart field string to use, Proceed to Checkout first, in order to access those fields, then Assign Cart.

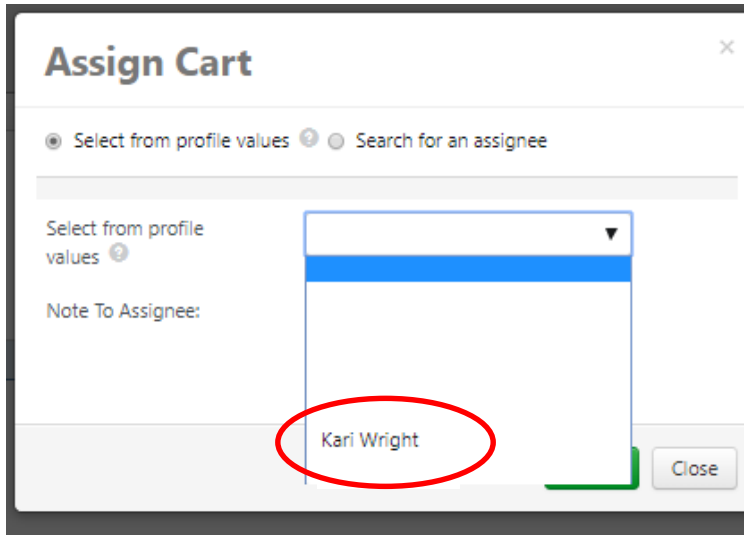
Assign Cart

Select from profile values Search for an assignee

Select from profile values:

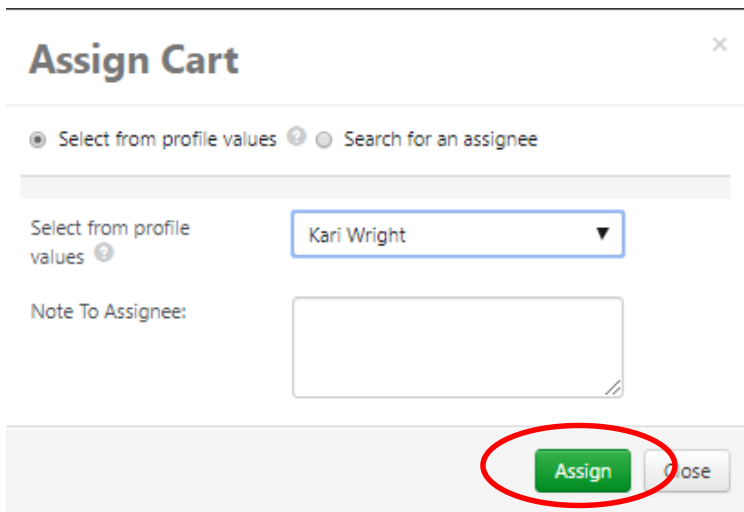
Note To Assignee:

Use the drop down menu to choose from a list of Assignees on profile or select Search for an assignee.



The screenshot shows the 'Assign Cart' dialog box. At the top, there are two radio buttons: 'Select from profile values' (which is selected) and 'Search for an assignee'. Below this, there is a section labeled 'Select from profile values' with a dropdown menu. The dropdown menu is open, showing a list of names, with 'Kari Wright' highlighted in blue. A red circle is drawn around the name 'Kari Wright' in the dropdown list. To the right of the dropdown menu is a 'Close' button.

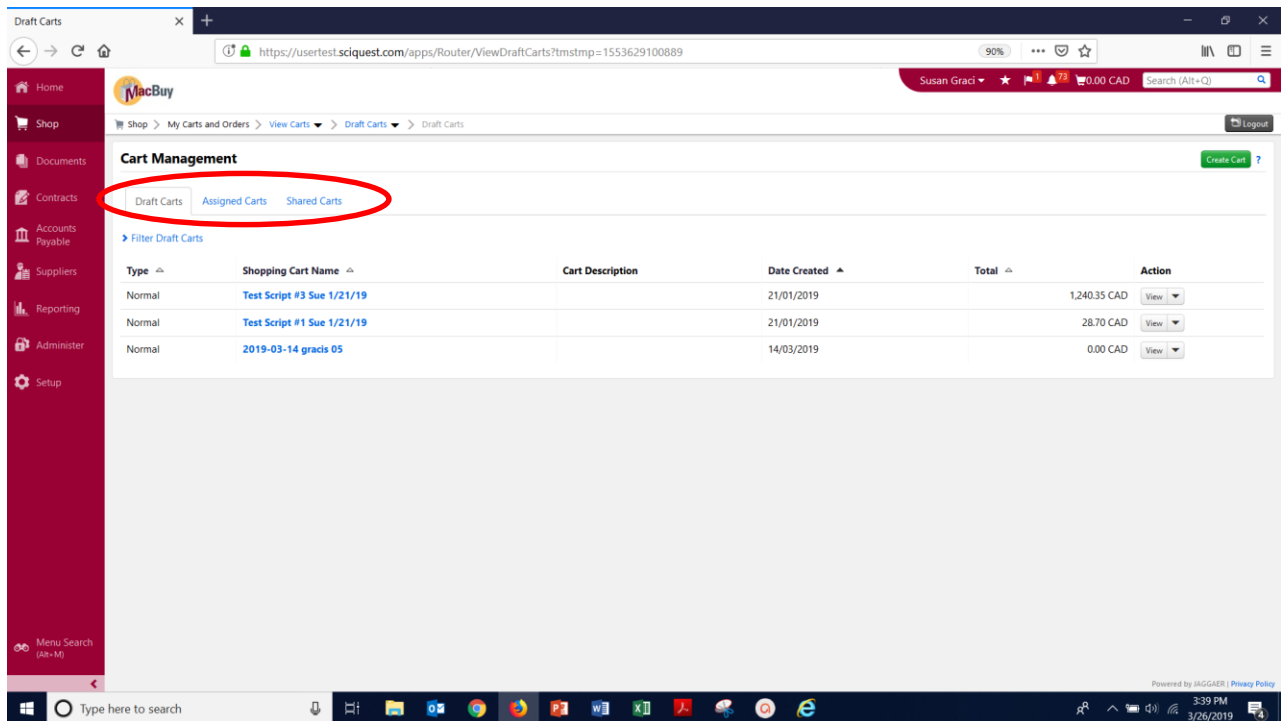
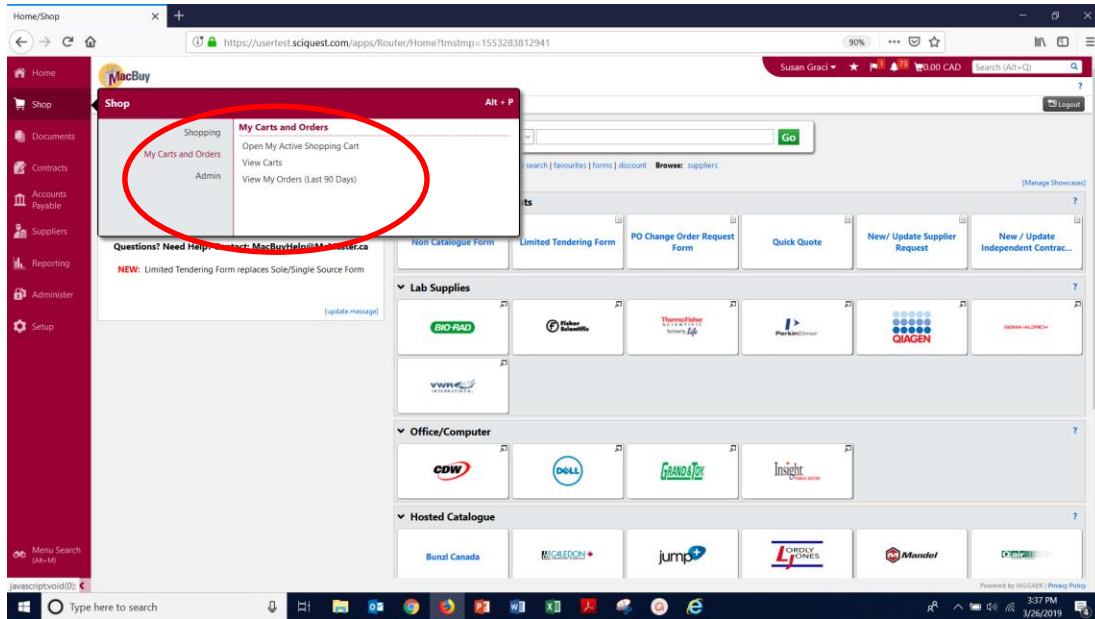
If User Profile has been set up with an Assignee, it will show up in the drop down menu.



The screenshot shows the 'Assign Cart' dialog box after the selection. The 'Select from profile values' dropdown menu now displays 'Kari Wright'. Below the dropdown is a text area labeled 'Note To Assignee:'. At the bottom right, there are two buttons: a green 'Assign' button and a grey 'Close' button. A red circle is drawn around the 'Assign' button.

Once the Assign button is clicked, the cart moves to the Requester, who is the person chosen as the Assignee. It can be withdrawn from the Assignee by the Shopper if further work is needed, as long as the Assignee has not started to work on submitting the cart.

To Unassign a Cart



Select the tab Assigned Carts.

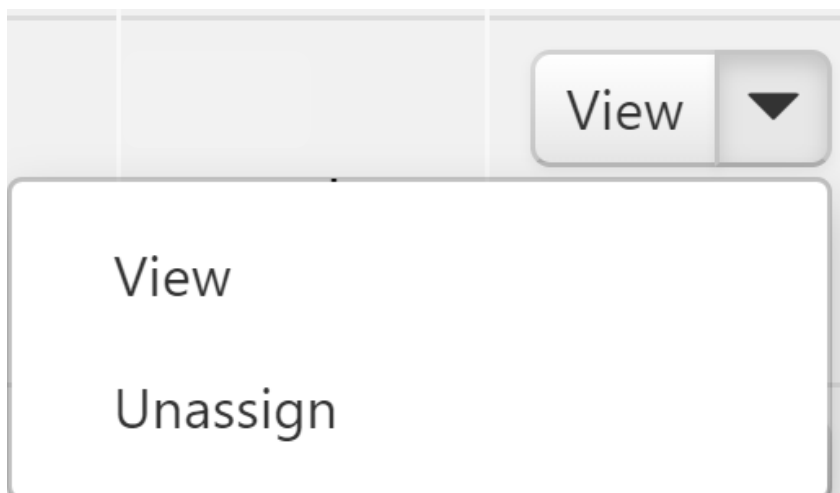
The screenshot shows the MacBuy Cart Management interface. The page title is "Assigned Carts" and the URL is "https://usertest.sciquest.com/apps/Router/ViewAssignedCarts?tmstamp=1553629098233". The user is logged in as "Susan Graci". The page shows a table of assigned carts with columns: Type, Shopping Cart Name, Cart Description, Date Created, Total, Created By, Assigned To, and Action. The second row is highlighted, and a red circle is drawn around the dropdown menu in the Action column, which contains "View" and "Unassign" options.

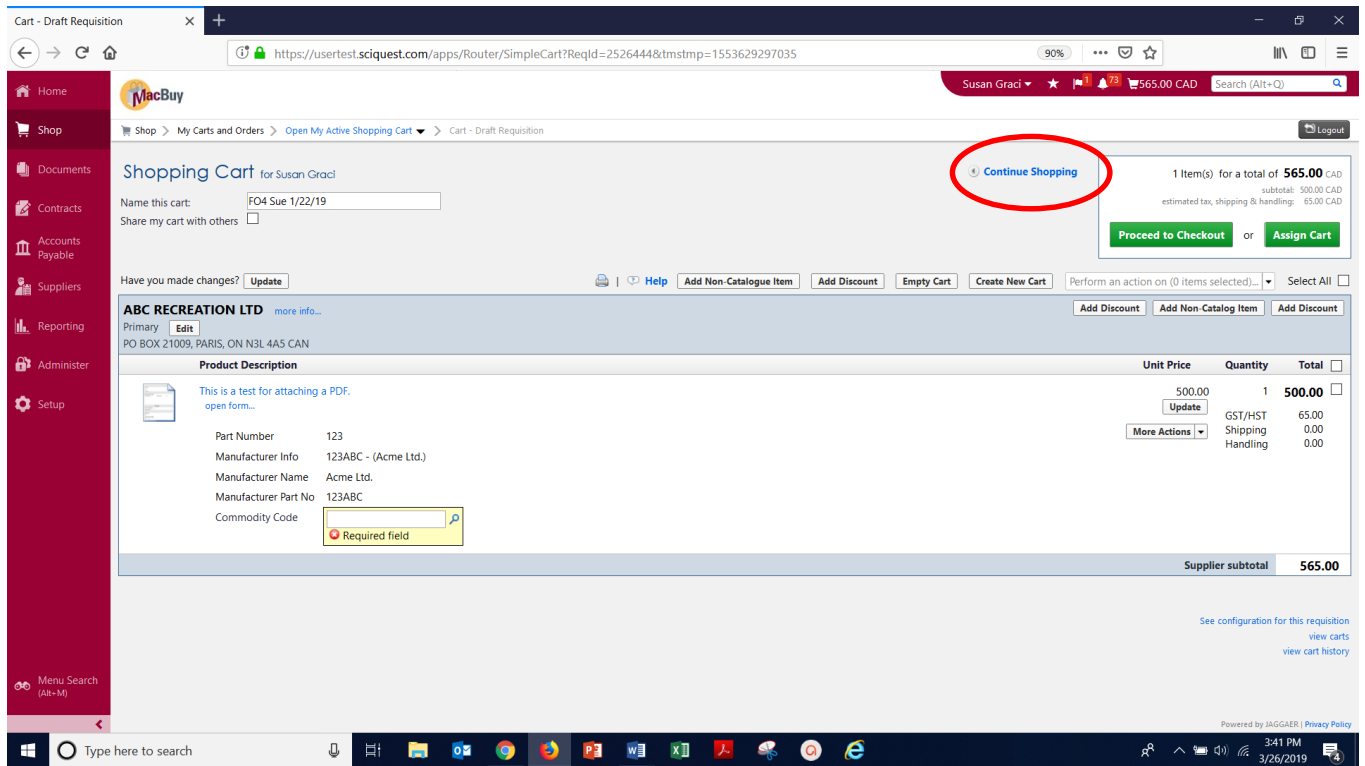
Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	FO4 Sue 1/22/19		22/01/2019	565.00 CAD	Susan Graci	Test Requester	View Unassign
Normal	FO5 Sue 1/22/19		22/01/2019	565.00 CAD	Susan Graci	Test Requester	View
Normal	FO6 Sue 1/22/19		22/01/2019	565.00 CAD	Susan Graci	Test Requester	View
Normal	FO8 Sue 1/22/19		22/01/2019	565.00 CAD	Susan Graci	Test Requester	View
Normal	2019-01-23 gracis 01		23/01/2019	775.17 CAD	Susan Graci	Test Requester	View
Normal	2019-02-07 gracis 01		07/02/2019	767.30 CAD	Susan Graci	Test Requester	View
Normal	2019-02-15 gracis 01		15/02/2019	0.00 CAD	Susan Graci	Test Requester	View
Normal	2019-02-19 gracis 01		19/02/2019	1,695.00 CAD	Susan Graci	Test Requester	View
Normal	Kolenski's Koffin		19/02/2019	565.00 CAD	Susan Graci	Test Requester	View
Normal	Kolenski Khaos		19/02/2019	36,996.20 CAD	Susan Graci	Test Requester	View
Normal	2019-02-19 gracis 02		19/02/2019	28.70 CAD	Susan Graci	Test Requester	View
Normal	2019-02-28 gracis 14 new computer		28/02/2019	1,863.99 CAD	Susan Graci	Teresa Carmel Wetton	View
Normal	2019-02-28 gracis 14		28/02/2019	73.45 CAD	Susan Graci	Kari Wright	View

Find the cart to be unassigned.

Click on the drop down menu on that line, below the Action heading.

Select Unassign.





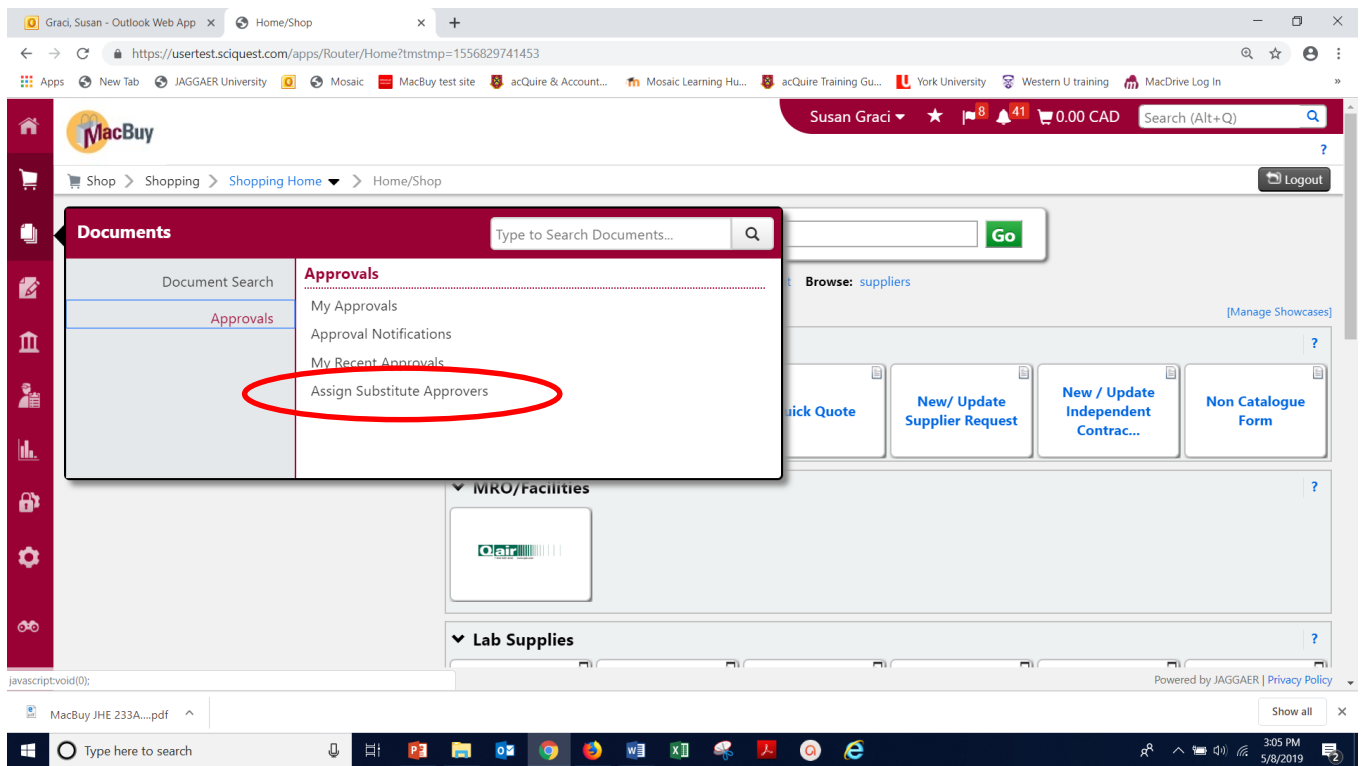
The system unassigns the cart and brings the user into the Active cart for further work.

To add more items to a cart, use the **Continue Shopping** hyper link.

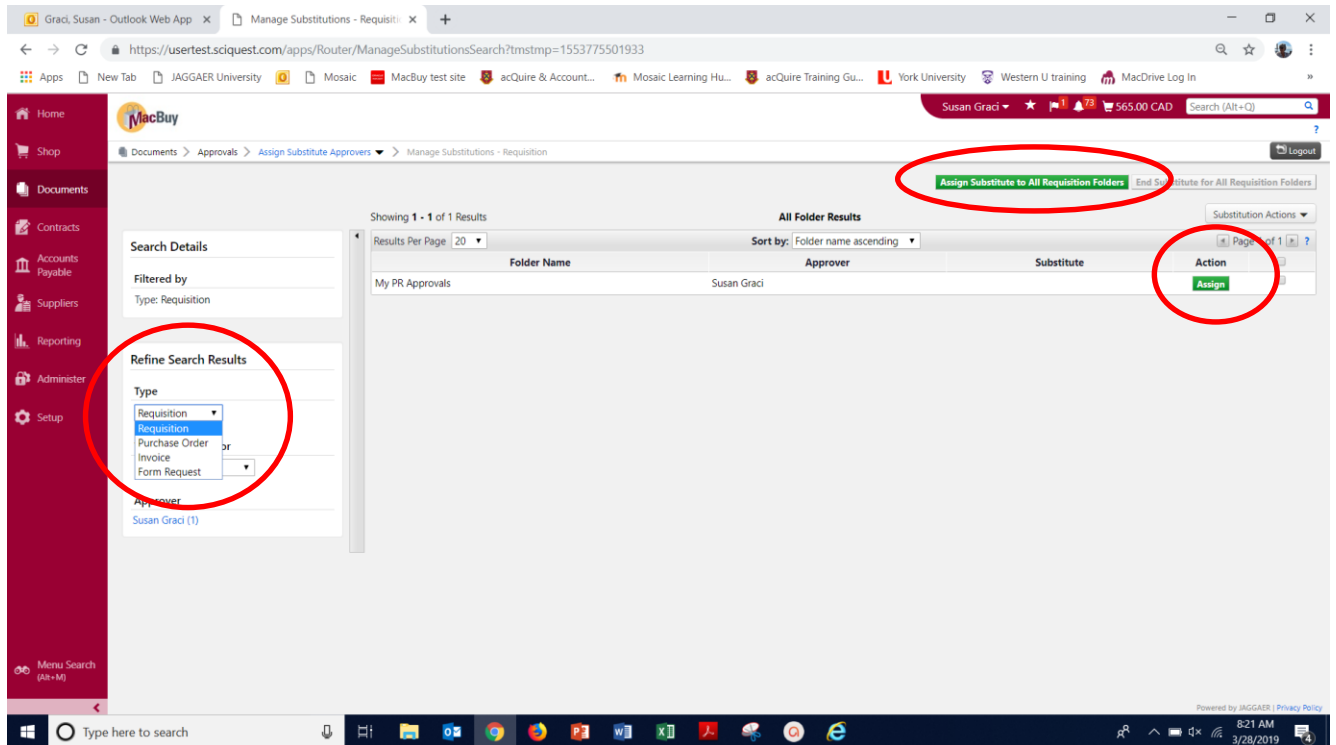
ASSIGN A DELEGATE (Approver or Requester)

To assign a delegate for approvals, go to the Navigation Toolbar (left side of screen) and select Documents then Approvals.

TIP: Requester and Approver roles only. Shopper role cannot delegate.

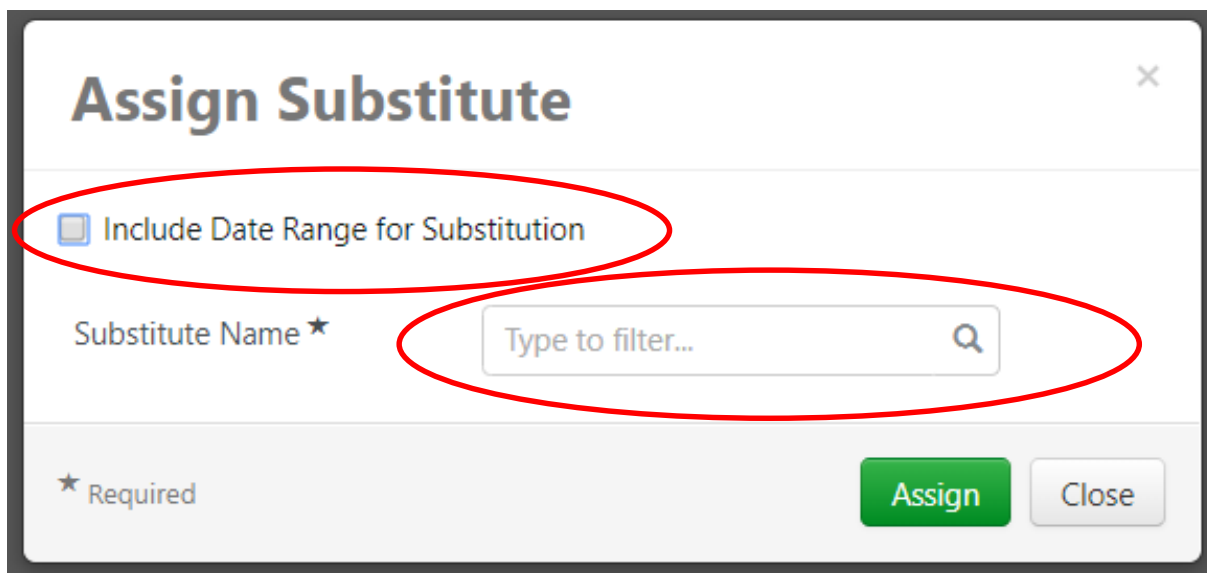


Documents>Approvals>Assign Substitute Approvers



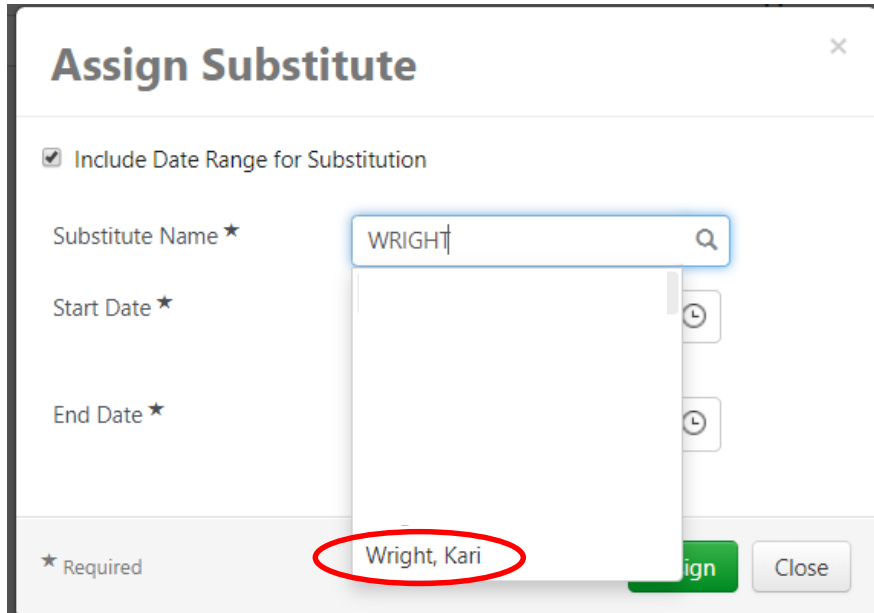
Select the type of approval to be assigned. Click on **Assign** button.

OR click **Assign Substitute to All Requisition Folders** button, upper right.



Check **Date Range** box.

TIP: Selecting a date range is very important for vacation or other absence delegations to avoid orders being delayed.



The image shows a software interface window titled "Assign Substitute". At the top left, there is a checked checkbox labeled "Include Date Range for Substitution". Below this, there are three input fields: "Substitute Name ★", "Start Date ★", and "End Date ★". The "Substitute Name" field contains the text "WRIGHT" and has a search icon to its right. A dropdown menu is open below the search field, displaying a single option: "Wright, Kari", which is circled in red. At the bottom left, there is a legend entry "★ Required". At the bottom right, there are two buttons: a green "Assign" button and a grey "Close" button.

Search for the name of person to be approval delegate.

Assign Substitute

Include Date Range for Substitution

Substitute Name ★

Start Date ★

End Date ★

★ Required Assign Close

Click on Assign once all information has been completed.

MacBuy | Susan Graci | 565.00 CAD | Search (Alt+Q)

Documents > Approvals > Assign Substitute Approvers > Manage Substitutions - Requisition

Assign Substitute to All Requisition Folders | End Substitute for All Requisition Folders

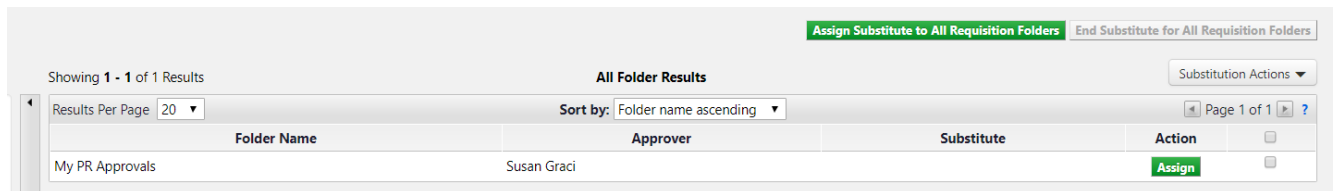
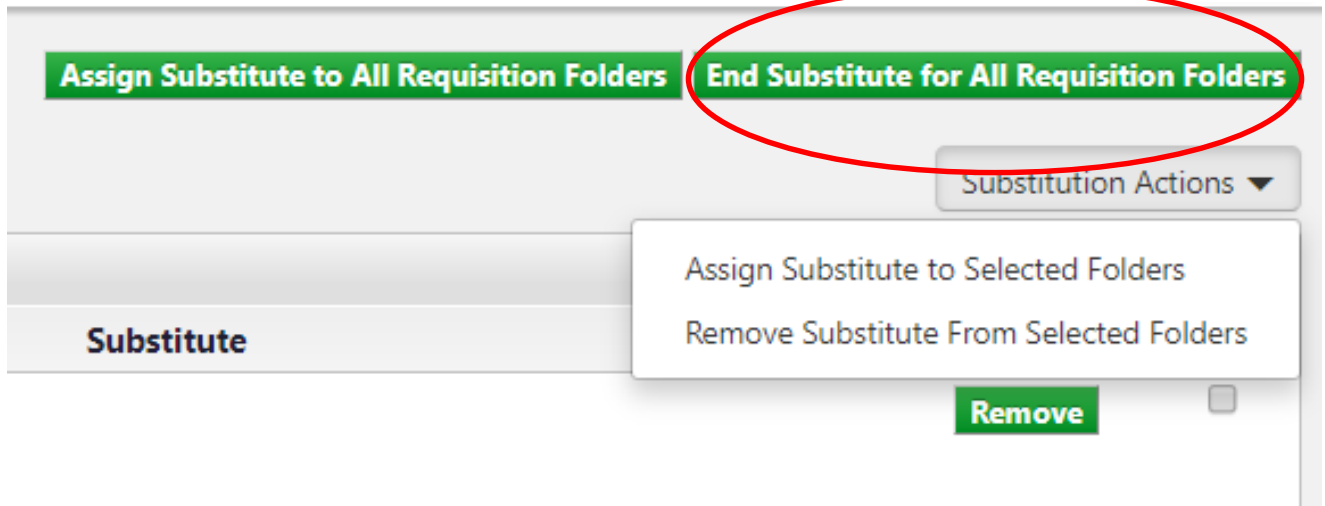
Showing 1 - 1 of 1 Results | All Folder Results | Substitution Actions

Folder Name	Approver	Substitute	Action
My PR Approvals	Susan Graci	Kari Wright Start Date: 29/03/2019 12:00 AM End Date: 01/04/2019 12:00 AM	<input type="checkbox"/> Remove

Delegate's name and the date range as well as the type of approval delegation all display on screen once process has been completed.

To remove delegation earlier than date range in place, click the **Remove** button.

Alternately, use the **Substitution Actions** drop down menu.



TIP: Remember to use the date range option to set approval delegation during absence to ensure coverage for purchases.