Queen Mary
University of London

Purchase to Pay Process

New purchase requisition workflow set up on Agresso from August 2014
Delegating approval limit to a substitute approver when out of the office

Helpful Tips no. 6 – October 2014

The new workflow set up which is now live on Agresso across QMUL, includes the ability for approvers to self-select their delegate (substitute approver) in advance, for the period they are out of the office.

All areas that have gone live with the new set up (you should have received confirmation of this from your co-ordinator – http://qm-web.finance.qmul.ac.uk/purchasing/documentsforms-/), had to provide details of approvers in their workflow approval chains and their delegated substitutes. These details are set up on Agresso as part of the new workflow set up for each area going live, which means **approvers can set up substitutes in advance** and no longer need to contact the Financial Systems Team to ask for the substitute to be set up, when they are going to be away from the office.

Please note
- If you do not delegate your approval limit on Agresso for the period you are going to be away from the office, the Agresso task will stay in your Agresso task box waiting for you to action it.

- **Reminders and escalations on Agresso** – if a task has not been dealt with on Agresso by an approver within four days of the task being sent out (e.g. requisition not reviewed and approved), a reminder email will be sent to the Agresso approver. Two days later if the task is still outstanding, the task will be escalated to the users "supervisor" (i.e. usually the next person in the approval chain, depending on the set up requested by each area).

To avoid delays in requisitions being reviewed and approved, please ensure you remember to set up your substitute approver. If you're not sure how to do this, see the "how to…" reminder below.

Tip: remember to activate your substitute approver on Agresso, at the same time as you set up your "out of office" message on Outlook.

How to …..Delegating your approval limit (activating your substitute on Agresso) when you are away from the office

- If your area is live with the new workflow set up on Agresso, the substitute details will have been set up on Agresso ready for you to use and activate when required
- If you are going to be away from the office (e.g. this can be for one day or longer), please ensure you go in to Agresso to activate your substitute approver

In Agresso enter the dates to cover the time you will be unavailable for approving transactions in the program "Substitute setup – Self-service" on the Options menu.
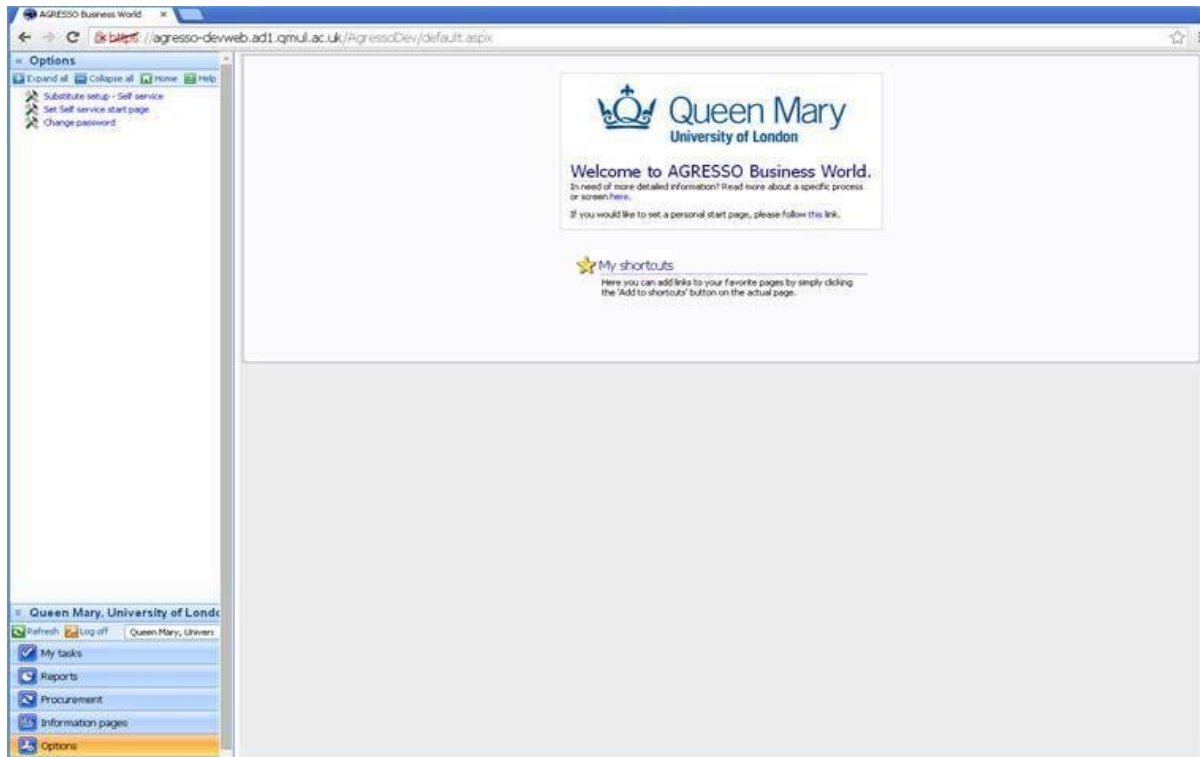
In the fields "Valid from date" and "Valid until date" enter the "from and to dates" to flag when you will be out of the office / won't be available. And **save** the settings.

Your substitute will be sent your tasks during this period (their user details will be displayed in the bottom half of the screen as their Agresso user initial).

Note: The task will still be sent to you as the original approver and in addition, it will be sent to the substitute.

After the "Active to date", the tasks will be sent solely to you (the original approver) again.

Please ensure you include the **valid until date**, otherwise the substitute will continue to receive your Agresso tasks, after you return to the office.
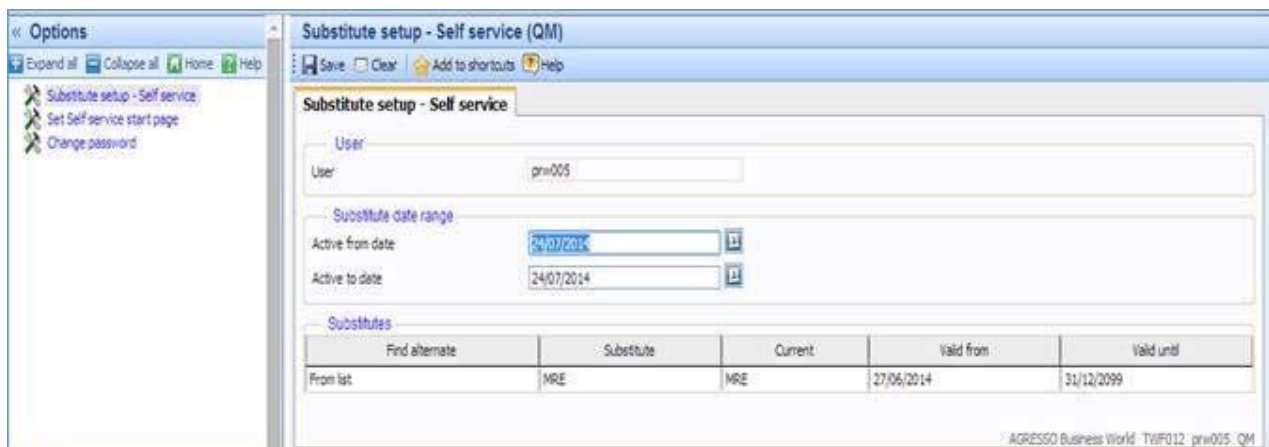
Any queries

- If you are unsure of who your substitute is, please contact your co-ordinator who will have details of the new workflow set up for your area (http://qm-web.finance.qmul.ac.uk/purchasing/documentsforms-/)

  Please note – in the majority of cases, this is the next person in the workflow approval chain.

- If you have any queries about or problems setting up substitutes, please contact the Financial Systems Team via the ITHelpdesk

- If you have a query about who can be set up as a substitute approver, please contact Janice Trounson (j.trounson@qmul.ac.uk)

  Please note – in line with the approved Scheme of Delegation of Financial Authority (http://www.arcs.qmul.ac.uk/media/arcs/policyzone/Scheme-of-Delegation-of-Financial-Authority-2017---Council-approved-and-amended.pdf, substitute approvers should be the next person in the workflow approval chain or a peer.