



14 July 2022

Exflow replacers

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When an employee leaves and they have created/submitted lots of invoices/PO's we need to add a replacer to their Exflow who will then approve these on behalf of the ex-employee.

To add a replacer – go to the ex-employees' Exflow user and add the person who will approve PO's into the replacer area

ExFlow user (1)

File

Users

ExFlow user New

Edit ExFlow users

Delete

Enable/Disable ticket lo...

Refresh

Export to Microsoft Excel list

Filter Role/Replacer Link

User ID: PeterCa - Peter Carser

| <input type="checkbox"/> | A | Comp... | User ID | User name | User level | Par... | User level name | E | A |
|--------------------------|---|---------|---------|--------------|------------|--------|-----------------|--------------------------|---|
| <input type="checkbox"/> | | GGNZ | peterc | Peter Cook | 1 | No | PowerUser | <input type="checkbox"/> | |
| <input type="checkbox"/> | | GGNZ | PeterCa | Peter Carser | 1 | Yes | PowerUser | <input type="checkbox"/> | |
| <input type="checkbox"/> | | GGNZ | Peterco | Peter Coory | 1 | Yes | PowerUser | <input type="checkbox"/> | |

Role

Add Remove

| <input type="checkbox"/> | Role reference | Name |
|--------------------------|-------------------------|-----------------------|
| | Equipment Delivery NAXT | XAP_EquipmentDelivery |

Replacer

Add Remove

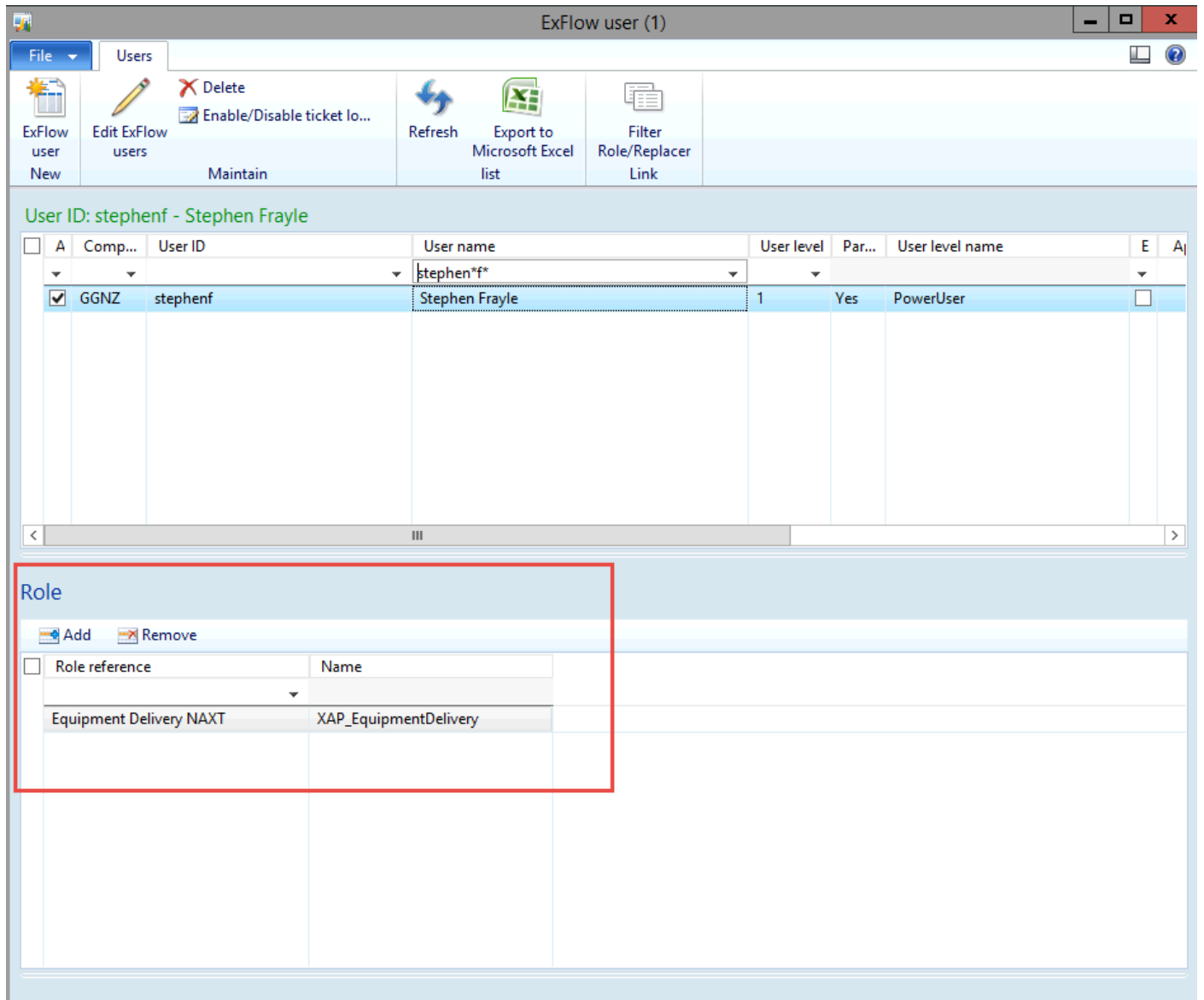
| <input type="checkbox"/> | Replacer | Name | Start date | End date |
|--------------------------|----------|----------------|------------|-----------|
| | stephenf | Stephen Frayle | 1/03/2021 | 6/04/2099 |

Navigation icons

Name

Close

Then go to the replacer's Exflow user and make sure they have the role below



ExFlow user (1)

File Users

ExFlow user New Edit ExFlow users Delete Enable/Disable ticket lo... Refresh Export to Microsoft Excel list Filter Role/Replacer Link

User ID: stephenf - Stephen Frayle

| A | Comp... | User ID | User name | User level | Par... | User level name | E | A |
|-------------------------------------|---------|----------|----------------|------------|--------|-----------------|--------------------------|---|
| <input checked="" type="checkbox"/> | GGNZ | stephenf | Stephen Frayle | 1 | Yes | PowerUser | <input type="checkbox"/> | |

Role

Add Remove

| Role reference | Name |
|-------------------------|-----------------------|
| Equipment Delivery NAXT | XAP_EquipmentDelivery |

If they don't have that role then they won't see the list of invoices/PO's needing to approve that normally the ex-employee would

If you want to see everyone with an Ex Flow role open Ex flow ->Users and then select filter Role/Replacer

