Designate a Substitute Approver

This job aid will guide you with steps on how to designate a substitute to review and approve system worklist items on your behalf. Worklist tasks may include approval tasks for Shopping Carts, Travel Expense Reports and Purchase Orders. As a task owner, you can assign multiple substitutes if desired and designate different individuals to act on your behalf for different worklist tasks.

---

1. From the System Home Tab, click on Universal Worklist

Welcome Test MANAGER18

Home

Home | Universal Worklist

Upcoming Dates

Detailed Navigation

- **Upcoming Dates**
- About BTS
- ALERT – R/3 Logoff Procedure
- Tech Support
- Help Zone
- Learning Zone
- SAP Business Workplace

---
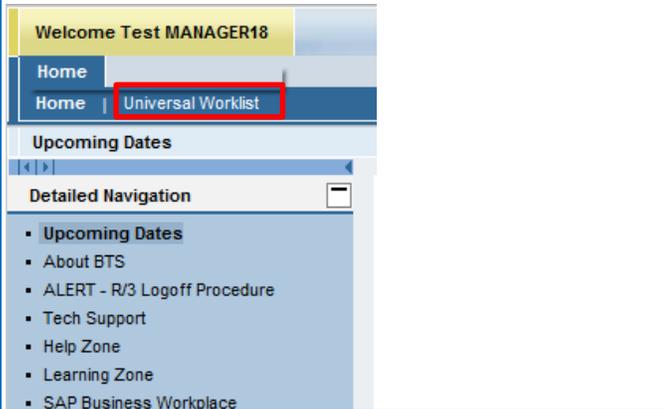
2. To Access the Manage Substitution Rules window, click on the Manage Substitution Rules icon 🗎 .

Help | Log off

History | Back Forwa

Create Task

m	Sent Date	Priority	📎	Due Date	Status
QUESTOR22, Test	Today	Medium			New
QUESTOR22, Test	Today	Medium			New

---
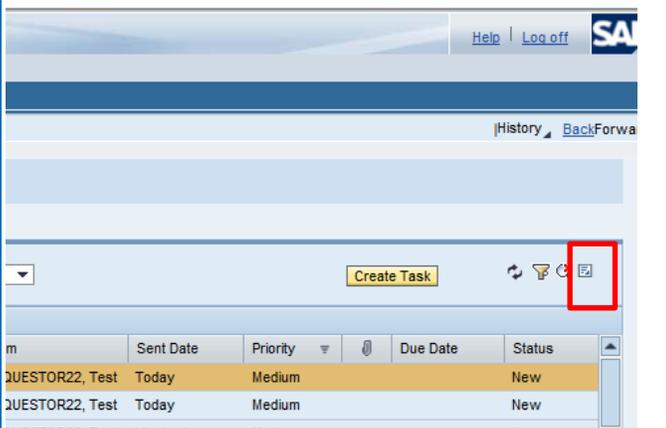
3. From the drop-down list, select Manage Substitutions.

Create Task

Refresh
Personalize View
Manage Substitution Rules

From	Sent Date	Priority	📎	
REQUESTOR22, Test	Today	Medium		New
REQUESTOR22, Test	Today	Medium		New
REQUESTOR22, Test	Yesterday	Medium		New
REQUESTOR22, Test	Yesterday	Medium		New
REQUESTOR22, Test	Yesterday	Medium		New

---
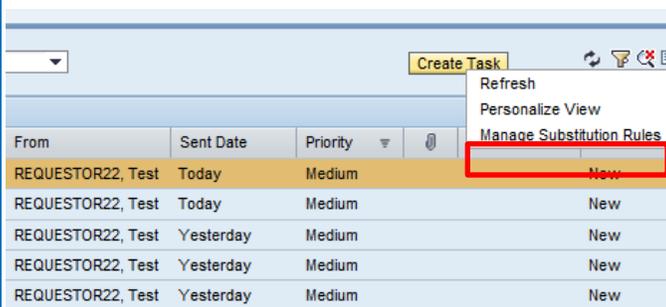
4. Create a new Substitution rule, click on the button Create Rule

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee re case you are unexpectedly absent). You can create several substitution rules to cov you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... | Delete | Refresh

	Tasks	Nominee	What To Do	Status

---

5. If you know the User id of the substitute, enter the User ID directly in the Nominee field.

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the assignee recei when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you are

1 — 2
Define Rule   Set Rule Activation

Nominee: [_____] Select...
Assign These Tasks: All

The nominee is the substitute for all tasks

I Want the Nominee to: ⦿ Receive My Tasks

You hand over tasks to the assignee for the duration of your planned absence; can set a start date for this rule

---

6. If the user id is unknown, click on the Select button to search for the substitute by name.

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the assignee recei when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you are

1 — 2
Define Rule   Set Rule Activation

Nominee: [_____] Select...
Assign These Tasks: All

The nominee is the substitute for all tasks
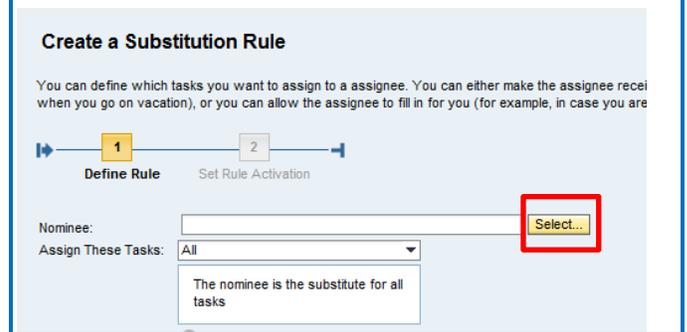
7. Enter the last name a space first letter of the first name followed by an asterisk. Then click the Search button.

8. If the user is found select the user, click on the row and then click on the button Apply.

9. Now select the substitution task from the drop down list: Assign These Tasks. In this example, I will select Shopping Cart Workflow. Selecting All will assign all tasks to the substitute.

10. Next select either the Receive My Tasks or the Fill in For Me radio button. If Receive My Tasks is selected, the substitute will immediately receive tasks in their Worklist. In this selection both the task owner and the substitute will receive email notifications to alert them of tasks needing action in the Worklist. NOTE: Either may approve the task and once it is approved it will disappear from the Universal Worklist (UWL). All "Time Keeper Approvers" will have the Shopping Cart Approver role. Now click on the Next button.

11. By default, the substitution rule is enabled At Once. This means that the substitute will receive new task items in their Universal Worklist.

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the as you can allow the assignee to fill in for you (for example, in case you are unexpectedly abs

① Define Rule — ② **Set Rule Activation**

On saving, turn on the following rule:: ● On - The rule will be enabled
   ● At Once
   ○ On [   ] 🗐
   ○ Off - The rule will not be enabled

You can turn the rule on or off at any time on the Substitution Rules Management screen.

◀ Previous | Save | Cancel

12. You can also specify a date of when you want the rule to be enabled.

Click on the **Save** button.

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the as you can allow the assignee to fill in for you (for example, in case you are unexpectedly abs

① Define Rule — ② **Set Rule Activation**

On saving, turn on the following rule:: ● On - The rule will be enabled
   ○ At Once
   ● On [5/31/2013   ] 🗐
   ○ Off - The rule will not be enabled

You can turn the rule on or off at any time on the Substitution Rules Management screen.

◀ Previous | Save | Cancel

13. After clicking on Save, note that the screen displays the new substitution rule.

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you case you are unexpectedly absent). You can create several substitution rules to cover all cases. You als you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... | Delete | Refresh

Tasks	Nominee	What To Do	Status
Shopping Cart Workflow	Gomez, Dario	Receives my tasks	Ongoing

14. If the desire is to create a substitute to "Fill In For Me", an example of the completed selection screen is below. The substitutes that are set up as "Fill In For Me" <u>will receive email notifications as soon as the substitute takes over the "Fill in For Me" approval task.</u>

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the assignee rec when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you ar

① **Define Rule** — ② Set Rule Activation

Nominee: [Yen, Laurie] Select...
Assign These Tasks: [Shopping Cart Workflow ▼]
I Want the Nominee to: ○ Receive My Tasks
   You hand over tasks to the assignee for the duration of your planned absence can set a start date for this rule
   ● Fill In For Me
   If you are unexpectedly absent, the assignee can take over your tasks comple

Next ▶ | Cancel

15. Select the date the substitution should begin and click the Save button.

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the as you can allow the assignee to fill in for you (for example, in case you are unexpectedly ab

① Define Rule — ② **Set Rule Activation**

On saving, turn on the following rule:: ● On - The rule will be enabled
   ● At Once
   ○ On [   ] 🗐
   ○ Off - The rule will not be enabled

You can turn the rule on or off at any time on the Substitution Rules Management screen.

◀ Previous | Save | Cancel

16. Note the differences in the Receives My Tasks and the Fills In For Me substitute Status.

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... | Delete | Refresh

Tasks	Nominee	What To Do	Status
Shopping Cart Workflow	Gomez, Dario	Receives my tasks	Ongoing
All	Yen, Laurie	Fills In For Me	Starts 5/31/13

17. If you are "Fill In" for someone else, this will display under **Other Users' Substitution Rules** section.

The substitute must click the Take Over button in order to fill in for the task owner.

18. To end the subtitue rule, the substitute should click the **End take-over** button when finished filling in for the task owner.