My Inbox – User Guide

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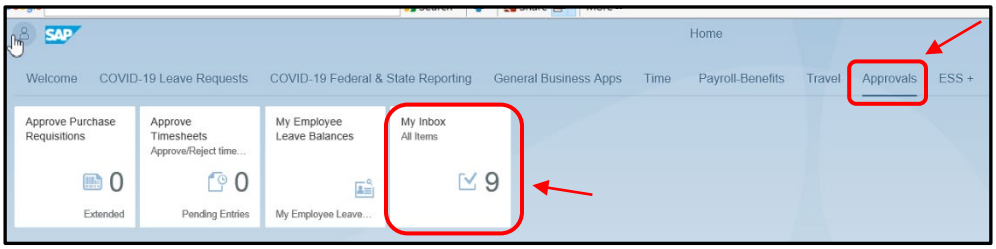
My Inbox – User Guide

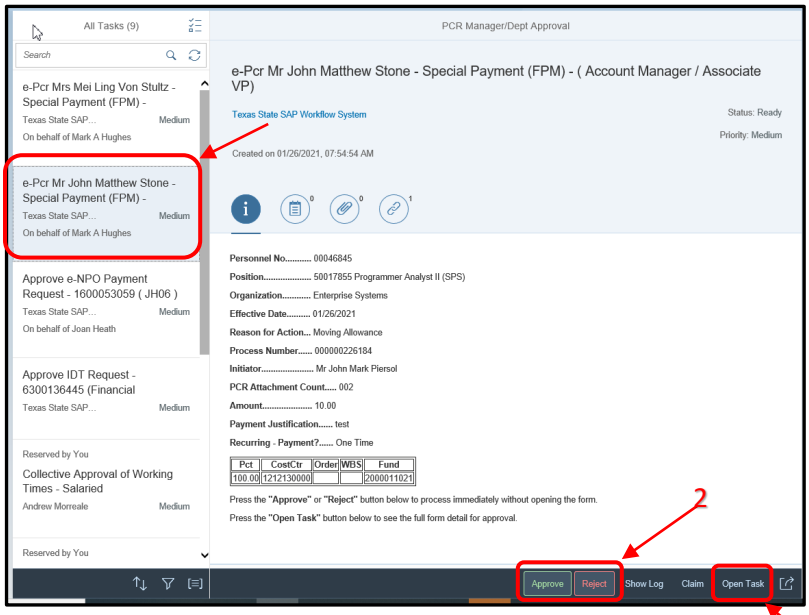
Getting Started

My Inbox is a mobile friendly SAP Portal application that will be **used for all SAP workflow approvals**. This application can be found on the SAP Portal in the **Approvals** section.



The count (9) identifies how many approval items you have.

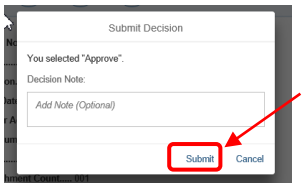
Quick Approvals (where approve/reject buttons are visible)



1. Click on a **task description** to choose an approval item to process.

2. Click **Approve** or **Reject** to process your approval decision.

3. A **comment box** will pop-up for providing a comment. Click **Submit** to log a comment.



4. To see more detail (like document attachments, etc.), click **Open Task** to launch a detailed approval screen.

NOTE: In the case where the **Approve** and **Reject** buttons are not available, click **Open Task** to process the approval item.

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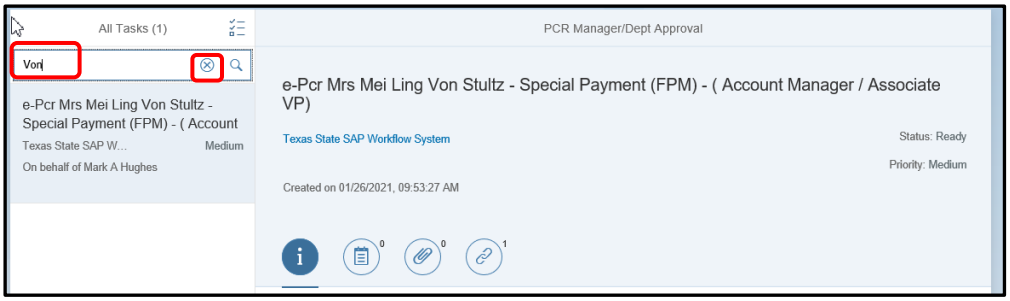
Search, Filter, and Group Tasks

My Inbox provides options for organizing tasks that make it easier to find specific tasks to approve when needed.

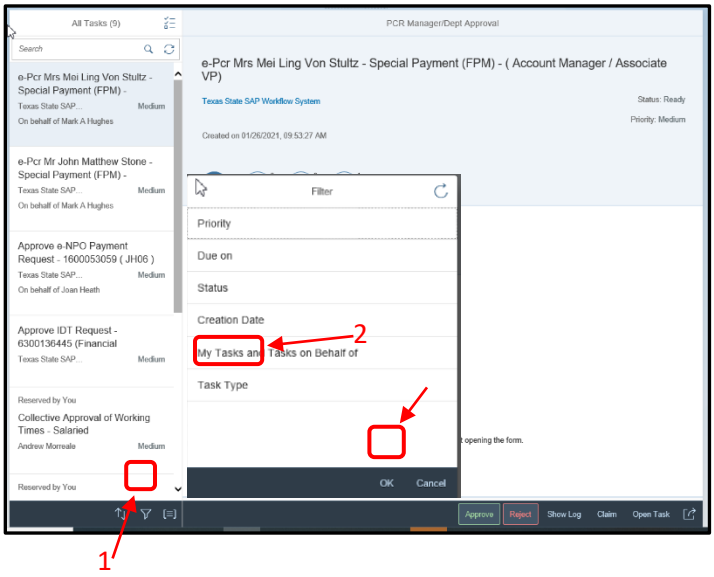
Search



1. Enter **text from a Task Description** to search.

2. Click **X** to clear search.

Filter By: Task Type

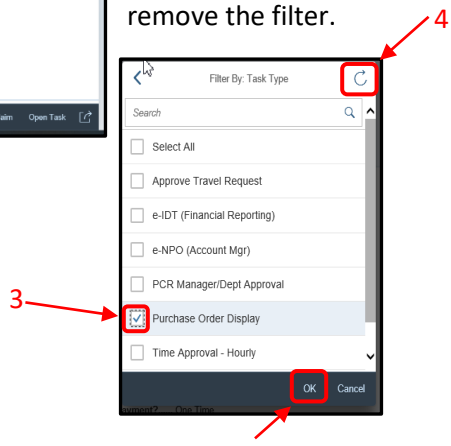


1. Click the **Filter button** to bring up a **filter option screen**.

2. Choose the **Task Type** filter and click OK.

3. Choose one or more **Task Types** and click **OK**.

4. Click the **Clear All Filters** button to remove the filter.



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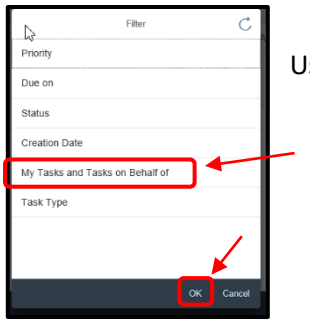
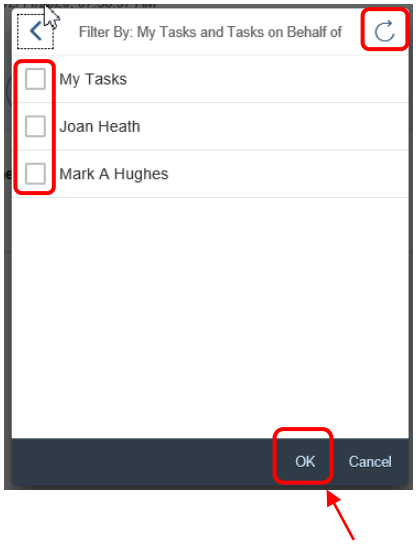
Search, Filter, and Group Tasks – cont.

Filter By: My Tasks and Tasks on Behalf of

(For a Scenario where you have been established as an approval substitute)



Using the filter options, choose **My Tasks and Tasks on Behalf of** and click **OK**.



1. Choose **one or more people** to see the tasks for which you are an approval substitute. Click **OK**.

2. Choose **My Tasks** to see ONLY your personal approval items.

3. Click **Clear All Filters** button to remove the filter.

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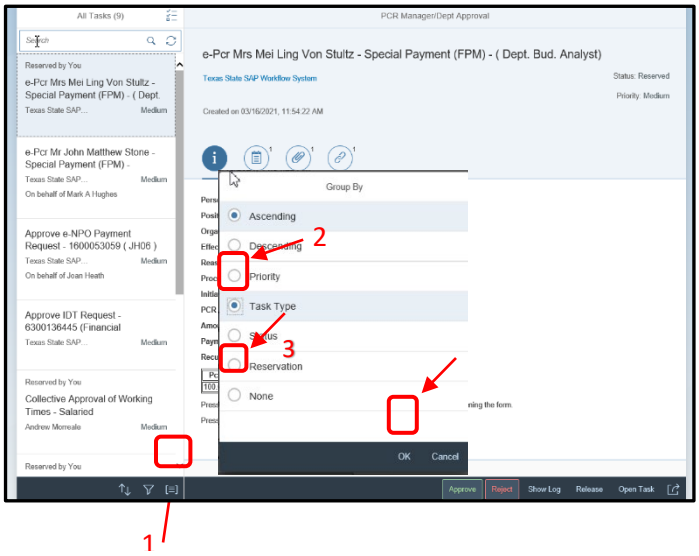
Search, Filter, and Group Tasks – cont.

Group

With Group, you can further arrange approval items.



1. Click the Group button to bring up the Group By option screen.

2. Choose **Group By** and click **OK**.
NOTE: This grouping will organize tasks by type (ie e-NPO,e-PCR, e-IDT, etc.).

3. Choose **None** to stop grouping and click **OK**.

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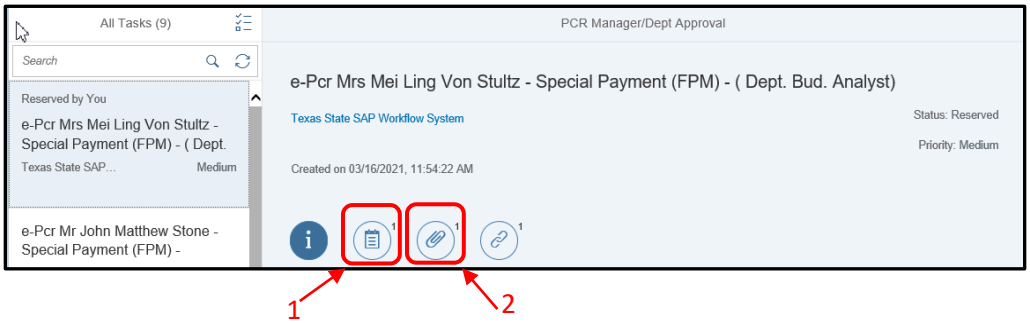
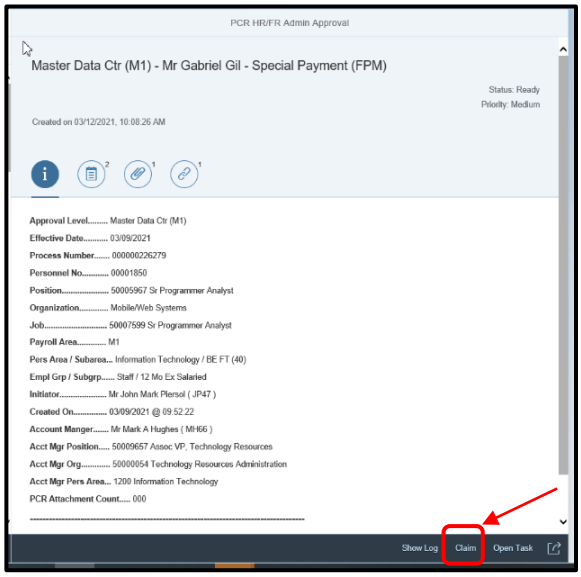
Comments and Attachments



1. Click on the **Comments button** to read what a prior approver noted when they completed an approval item using the **Approve** or **Reject** button and providing a comment.

2. Click on the **Attachments** button to add a supplemental attachment. You can also click to see what a prior approver has attached.

Claim and Release Tasks



1. Click **Claim** to reserve a task for your processing only.

NOTES: Claiming is relevant in a group approval situation. Only you will see a claimed task.

In addition, as an approval substitue, you can claim a task to remove task visibility from a primary approver.

After claiming a task, click **Release** if necessary to make a task visible again to the entire group (or primary approver).

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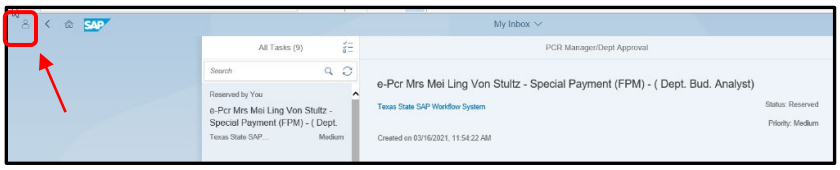
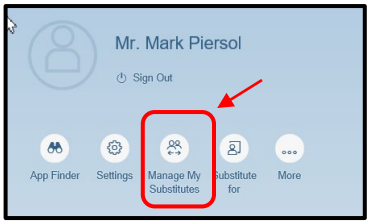
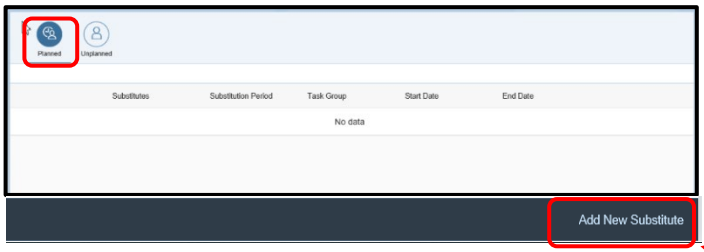
Setting up a Planned Approval Substitute



1. Go to My Inbox and click on the User Icon.



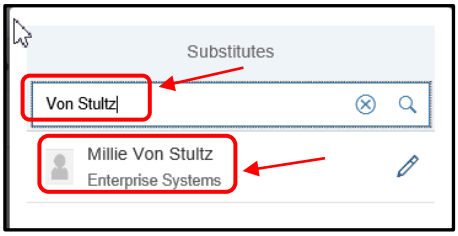
2. Click **Manage My Substitutes**.



3. Click **Add New Substitute**.

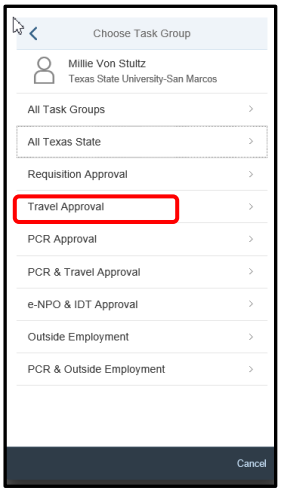
NOTE: The default substitute type is **Planned**.

A planned substitue is an ongoing substitute that always sees tasks in My Inbox as they become available.



1. Enter the name of the person (partial name) to establish as a substitute and click the search.

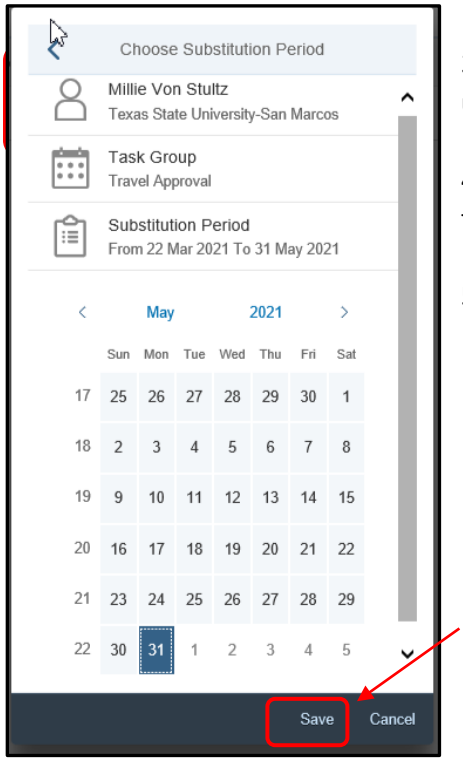
Click on the **desired name** to choose.



2.Click to choose a **Task Group** for your new substitute (e.g., Travel Approval).

NOTE: Only one task group can be established for an individual substitute.

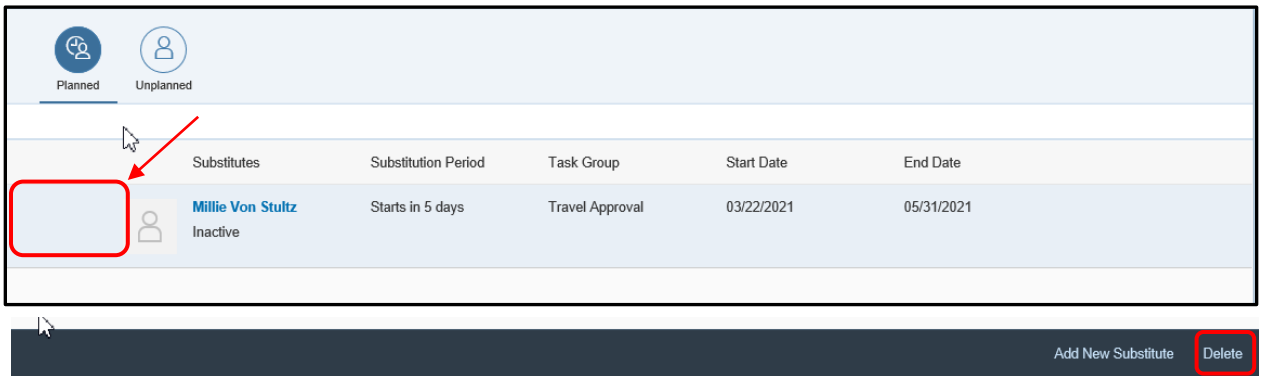
Setting up a Planned Approval Substitute – cont.



3. The default start date is today. **Adjust to a future start date** using calendar (if necessary).

4. Choose an **end date on the calendar** if the substitution is temporary.

5. Click **Save**.



Established substitutes cannot be edited, but they can be deleted.

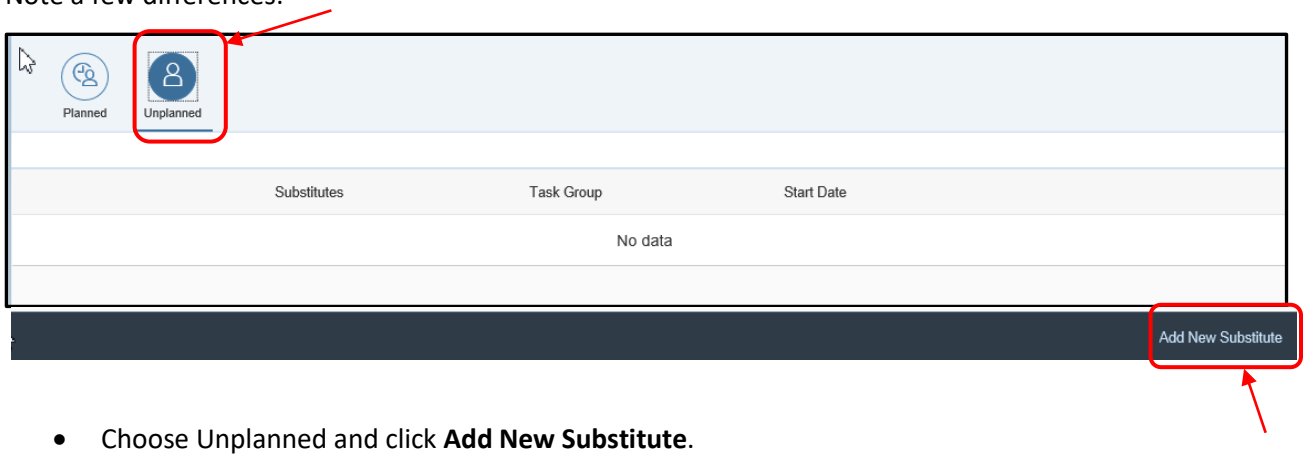
- To delete a substitute, click to the **left of the name** and click **delete**.
- Confirm deletion.

Setting up an Unplanned Approval Substitute

Unlike a Planned Approval Substitute, an unplanned substitute does not see any approval items unless they opt to receive tasks for each primary approver. The intention is for the unplanned substitute to take over this duty periodically as needed.

To set up follow the steps for “Setting up a Planned Approval Substitute” (pg. 7).

Note a few differences:



- Choose Unplanned and click **Add New Substitute**.

No calendar is provided since unplanned substitutes “take over” as necessary not limited by dates.

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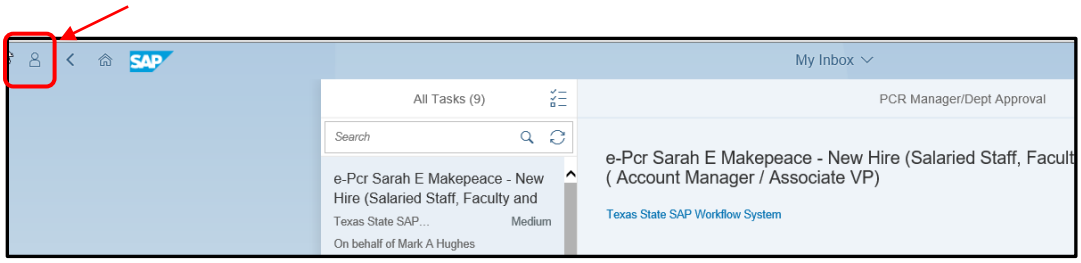
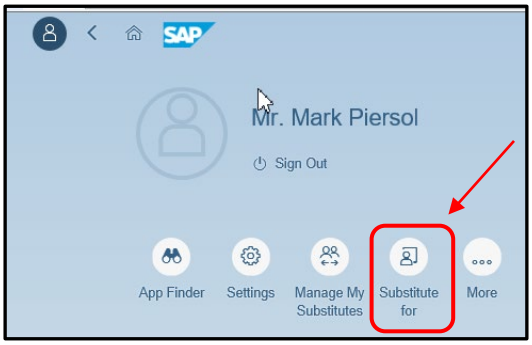
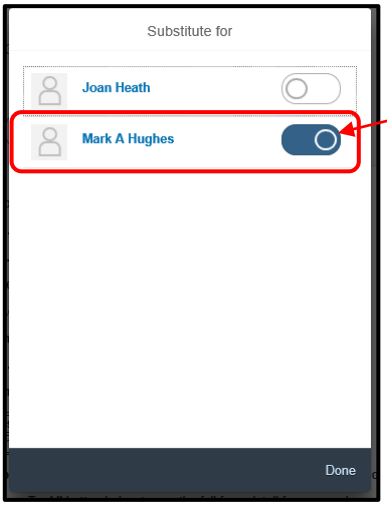
Receiving tasks as an Unplanned Approval Substitute



1. Go to **My Inbox** and click on the User Icon.



2. Click on **Substitute for**.



3. Choose **one or more primary approvers** to receive tasks for by **sliding switch to the right**.

4. **Slide the switch back to the left** when you are finished receiving tasks.