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Getting Started

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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.

- 3.0						
8 SAP					Home	
Welcome COVIE)-19 Leave Requests	COVID-19 Federal &	State Reporting 0	General Business Apps	Time Payroll-Benefits	Travel Approvals ESS +
Approve Purchase	Approve	My Employee	My Inbox			
Requisitions	Timesheets Approve/Reject time	Leave Balances	All Items			
🗈 0	6 0	a =	⊠ 9			
Extended	Pending Entries	My Employee Leave				

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

1. Click on a task description to All Tasks (9) χΞ PCR Manager/Dept Approval 6 90 choose an approval item to e-Pcr Mr John Matthew Stone - Special Payment (FPM) - (Account Manager / Associate VP) e-Pcr Mrs Mei Ling Von Stultz -Special Payment (FPM) process. Status: Ready Tox Texas State SAP. Medium Priority: Medium On behalf of Mark A Hughes Created on 01/26/2021, 07:54:54 AM 2. Click Approve or Reject to e-Pcr Mr John Matthew Stone Special Payment (FPM) -**i** process your approval decision. exas State SAP On behalf of Mark A Hughes 50017855 Programmer Analyst II (SPS) Approve e-NPO Payment 3. A **comment box** will pop-up for Request - 1600053059 (JH06) Organization..... Enterprise Systems xas State SAP.. Effective Date...... 01/26/2021 On behalf of Joan Heath Reason for Action... Moving Allowa providing a comment. Click Submit Process Number..... 000000226184 Mr John Mark Pierso to log a comment. Approve IDT Request -6300136445 (Financial PCR Attachment Count..... 002 10.00 Fexas State SAP... Medium mount..... Payment Justification test Submit Decision Recurring - Payment?..... One Time rved by You
 Pct
 CostCtr
 Order
 WBS
 Fund

 100.00
 1212130000
 2000011
/ou selected "Approve" Collective Approval of Working Times - Salaried 00011021 Press the "Approve" or "Reject" button below to process immediately without opening the form 3 Andrew Morreale Medium Add Note (Optional Press the "Open Task" button below to see the full form detail for approval ved by You Submi Ca Show Loa

Quick Approvals (where approve/reject buttons are visible)

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

Λ

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

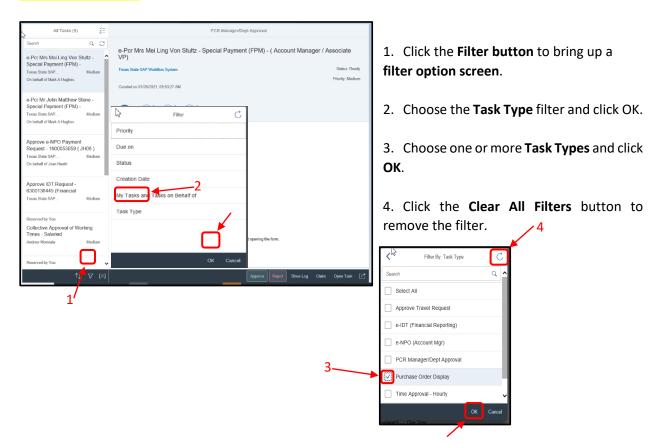
Search, Filter, and Group Tasks

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

Search



Filter By: Task Type



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)

Filter C	
Priority	Using the filter options, choose My Tasks and Tasks on Behalf of and click OK .
Due on	Using the little options, choose my rasks and rasks on behan of and click ok.
Status	
Creation Date	_
My Tasks and Tasks on Behalf of	
Task Type	
OK Cancel	

Filter By: My Tasks and Tasks on Behalf of	C	1
My Tasks		y
Joan Heath		,
Mark A Hughes		2
_		it
		3
ок са	ancel	
N 1		

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

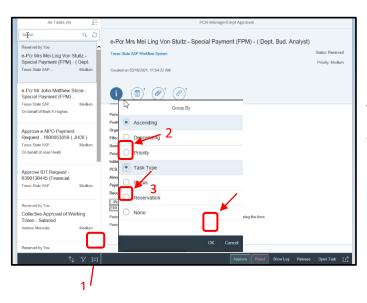
Choose My Tasks to see ONLY your personal approval tems.

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

Search, Filter, and Group Tasks - cont.

<mark>Group</mark>

With Group, you can further arrange approval items.

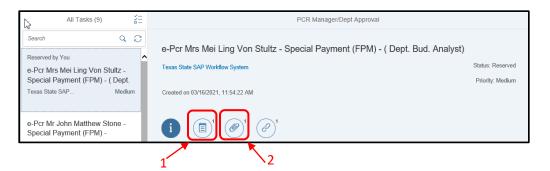


1. Click the Group button to bring up the Group By option screen.

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

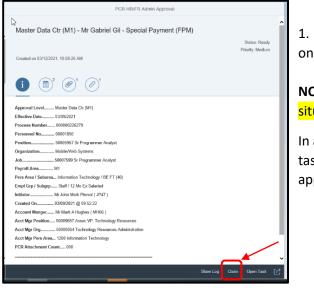
3. Choose **None** to stop grouping and click **OK**.

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.

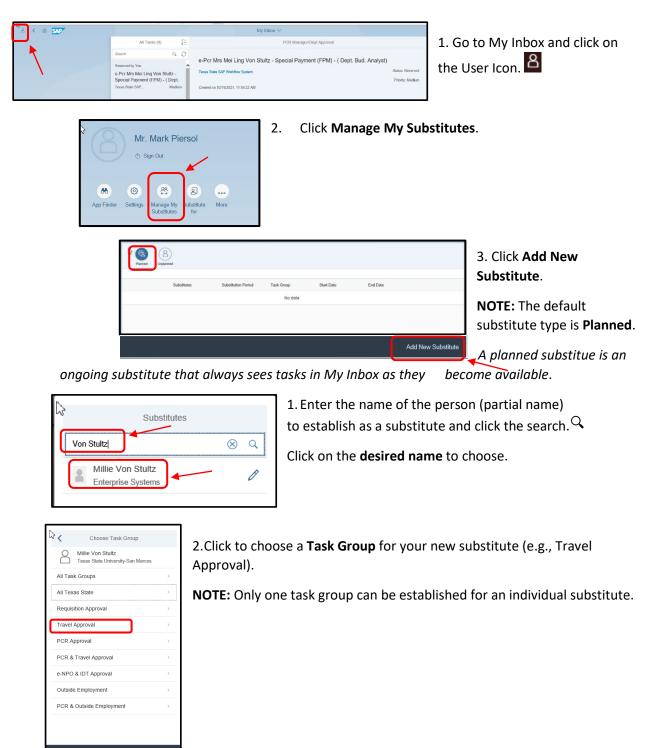
NOTES: Claiming is relevant in a group approval situation. Only you will see a claimed task.

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

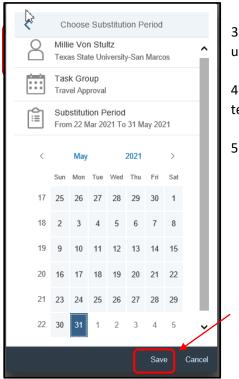


After claiming a task, click **Release** if necessary to make a task visible again to the entire group (or primary approver).

Setting up a Planned Approval 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.

	nned	Unplanne) ed						
	3		/						
	45		Substitutes	Substitution Period	Task Group	Start Date	End Date		
		8	Millie Von Stultz Inactive	Starts in 5 days	Travel Approval	03/22/2021	05/31/2021		
~									Delete
								Add New Substitute	Delete

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:

2	Planned	B Unplanned				
			Substitutes	Task Group	Start Date	
				I	No data	
						Add New Substitute
						<u> </u>

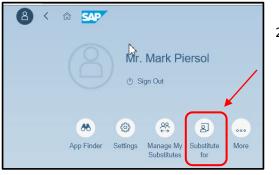
• Choose Unplanned and click Add New Substitute.

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

2 < a 🔐		My Inbox \sim						
	All Tasks (9)	PCR Manager/Dept Approval	1. Go to					
	Search Q C	- Des Conste E Malussones - New Une (Colorised Cloff, Frankling	My Inbox					
	e-Pcr Sarah E Makepeace - New	e-Pcr Sarah E Makepeace - New Hire (Salaried Staff, Facult (Account Manager / Associate VP)						
	Hire (Salaried Staff, Faculty and Texas State SAP Medium	Texas State SAP Workflow System	the User					
	On behalf of Mark A Hughes		ادon. <mark>8</mark>					



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.