

SAP substitution allows task owners to designate a substitute to act on worklist tasks on their behalf. Worklist tasks can include approval tasks for PCR's, Travel and Purchase Requisitions.

A task owner can have multiple substitutes if desired. A task owner can designate different individuals to act on their behalf for different worklist tasks. See example below.

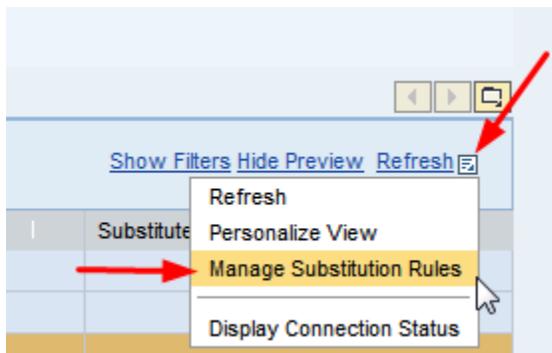
Task Owner	Jane's Substitutes
Jane	Bob is Jane's substitute for Travel
	Sally is Jane's substitute for PCR's
	Grace is Jane's substitute for Requisitions
	Tess is also Jane's substitute for Requisitions
	Joe is Jane's substitute for Requisitions, Travel and PCR's (All Texas State)

Manage Substitutions

To manage substitution designees go to the SAP Portal Worklist, click on the icon

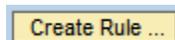


and choose Manage Substitution Rules. The icon is located at the far right hand side of the screen.

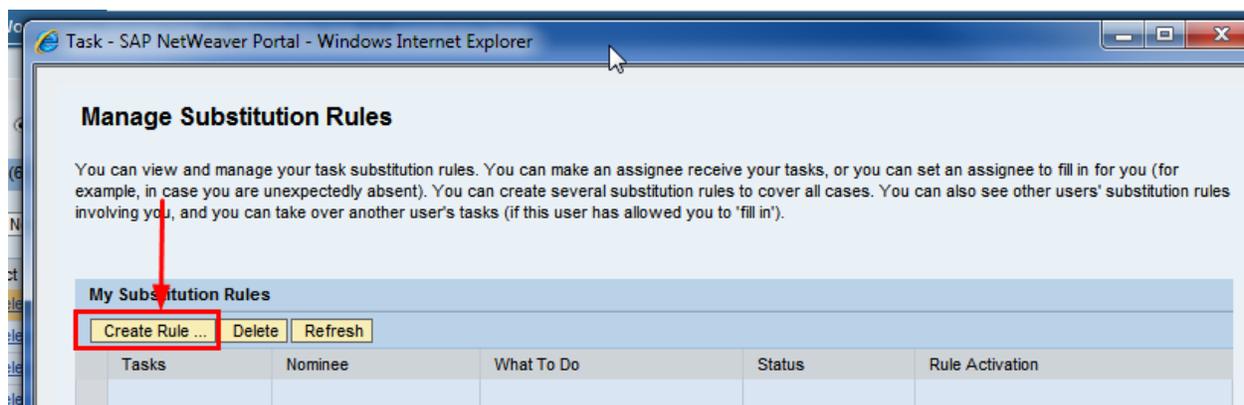


When you click on Manage Substitution Rules a new window will open and “pop up”.

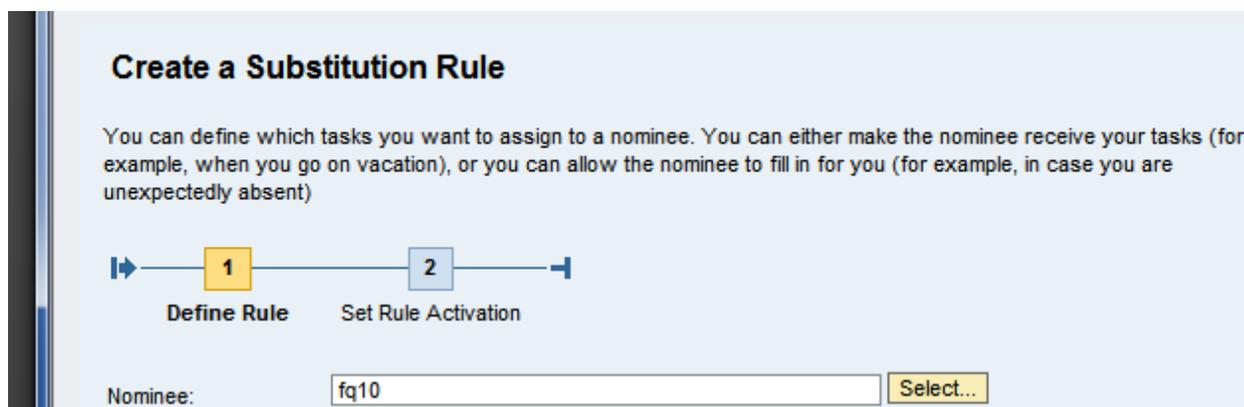
Click on the button



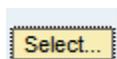
to create a new substitution rule.



If you know the user id of the substitute, you can enter it directly in the Nominee field.



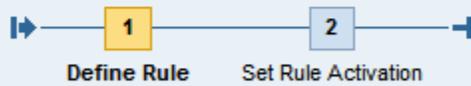
If the user id is unknown, click on the



button to search for the substitute.

Create a Substitution Rule

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



Nominee:

Select...



The last name only can be entered or the last name and partial first name can be entered to narrow the search. Once the individual is found, click on the button

Apply

Search For People

Search For Names:

Current Selection	
	Quinn, Floyd

Now select the substitution task from the drop down list: Assign These Tasks. In this example, we are selecting PCR Approval. PCR Approval, Travel Approval and Requisition Approval are supported options. Selecting All will return an error and no substitute will be established. If a substitute is needed to approve Requisitions, Travel and PCR documents select the option "All Texas State" in Assign These Tasks.

Create a Substitution Rule

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

1 Define Rule 2 Set Rule Activation

Nominee: Quinn, Floyd

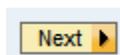
Assign These Tasks:
~~All~~
All Texas State
Requisition Approval
Travel Approval
PCR Approval

I Want the Nominee to: Receive My Tasks Fill in For Me

For the duration of your planned absence, you can set a start date for this rule.

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 to act upon. In this selection both the task owner and the substitute will receive email notifications to alert them to tasks needing action in the Worklist.

Now click on the



button.

Create a Substitution Rule

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



Nominee:

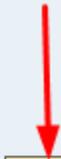
Assign These Tasks:

I Want the Nominee to: Receive My Tasks

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

Fill In For Me

If you are unexpectedly absent, the nominee can take over your tasks completely



By default, the substitution rule is enabled by the On button.

On - The rule will be enabled

Click

Create a Substitution Rule

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



On saving, turn the rule:: On - The rule will be enabled
 At Once
 On

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 can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules				
Tasks	Nominee	What To Do	Status	Rule Activation
PCR Approval	Quinn, Floyd	Receives my tasks	Ongoing	Successful

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” will not receive email notifications.

Create a Substitution Rule

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

Nominee:

Assign These Tasks:

I Want the Nominee to: Receive My Tasks
 You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule

Fill In For Me
 If you are unexpectedly absent, the nominee can take over your tasks completely

Select the date the substitution should begin and click the

button.

Create a Substitution Rule

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

On saving, turn the rule:: On - The rule will be enabled
 At Once

On

Note the differences in the Receives My Tasks and the Fills In For Me substitutes.

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and 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	Rule Activation
	PCR Approval	Quinn, Floyd	Receives my tasks	Ongoing	Successful
	PCR Approval	Piersol, Mark	Fills In For Me	Starts 7/14/11	Successful
	Requisition Approval	Haynes, Krista	Fills In For Me	Ongoing	Successful
	All Texas State	Hughes, Ruby	Receives my tasks	Ongoing	Successful

If you are a substitute for someone else, this will display under Other Users' Substitution Rules.

The "Fill In" substitute must click the

[Take over](#)

button in order to fill in for the task owner.

The "Fill In" substitute should click the

[End take-over](#)

button when finished filling in for the task owner.

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and 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	Rule Activation
PCR Approval	Quinn, Floyd	Receives my tasks	Ongoing	Successful
PCR Approval	Piersol, Mark	Fills In For Me	Starts 7/14/11	Successful
Requisition Approval	Haynes, Krista	Fills In For Me	Ongoing	Successful
All Texas State	Hughes, Ruby	Receives my tasks	Ongoing	Successful

Row 1 of 4

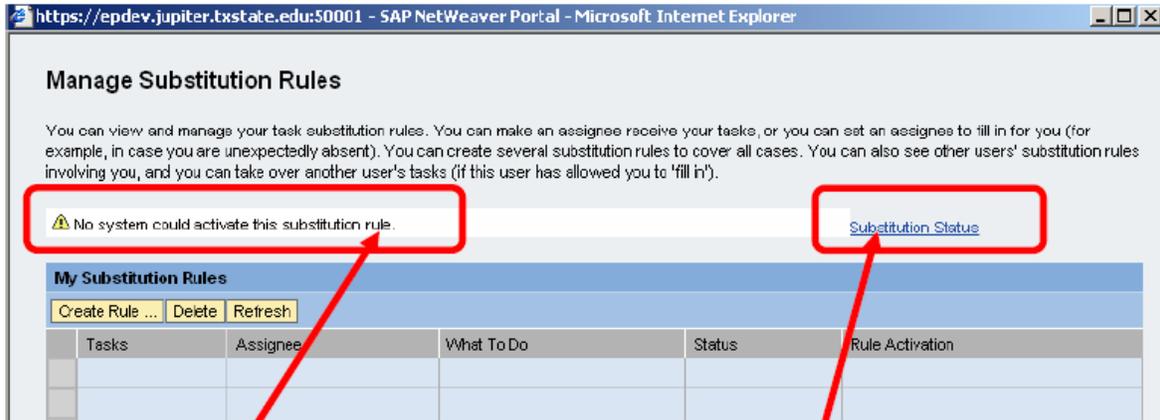
Other Users' Substitution Rules				
Task Owner	Tasks	What To Do	Status	
Snodgrass, Gregory	PCR Approval	Fill In	Ongoing	Take over
Nielsen, Milton	PCR Approval	Fill In	Ongoing	End take-over
Ondreyka, Terrance	All Texas State	Receive	Ongoing	

Row 1 of 3

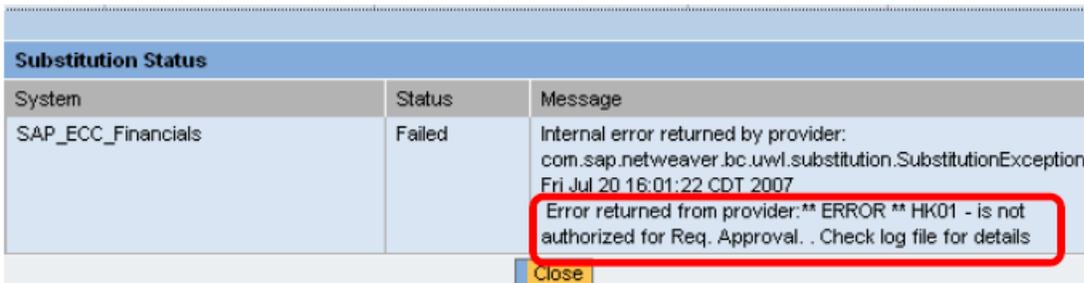
Important! Click Refresh when you return to the main worklist screen to see the results of Take Over and End Take Over actions.

[Show Filters](#) [Hide Preview](#) [Refresh](#)

Quick Tip



If you see this message after saving a new substitution rule, press here to see the error message.



Substitution Status Error Message – Pop up

Note: You will see this error if for Assign These Tasks “All” is selected.



Or if the substitute selected is not authorized via SAP security roles for the substituted activity.

Reminder: If a substitute is needed to approve Requisitions, Travel and PCR documents select the option “All Texas State” in Assign These Tasks.

All Texas State
Requisition Approval
Travel Approval
PCR Approval