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

2

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

Create Rule ...

to create a new substitution rule.

/o 	🏉 Т	ask - SAP NetWea	wer Portal - Windows Int	ernet Explorer				
¢		Manage Sub	stitution Rules					
(6 N	an set an assignee to fill in for you (for nu can also see other users' substitution rules							
ele	My Sub <mark>stitution</mark> Rules							
ele	Create Rule Delete Refresh							
ele ele		Tasks	Nominee	What To Do	Status	Rule Activation		

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

	Create a Subs	titution Rule	
l	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)		
	l þ 1	2	
	Define Rule	Set Rule Activation	
	Nominee:	fq10 Select	

If the user id is unknown, click on the

Select...

button to search for the substitute.

Create a Subs	titution Rule		
You can define which example, when you go unexpectedly absent)	tasks you want to assign to a nominee. Yo on vacation), or you can allow the nomine	You can either make the nominee receive your tasks (for nee to fill in for you (for example, in case you are	or
l) 1	2		
Define Rule	Set Rule Activation	1	
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: quinn fl							
Current Selection							
<u>å</u>	Quinn, Floyd						
Apply Cancel							

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 Subst	Create a Substitution Rule					
You can define which t example, when you go unexpectedly absent)	You can define which tasks you want to assign to a nominee. You can either make the nomine example, when you go on vacation), or you can allow the nominee to fill in for you (for exampl unexpectedly absent)					
l∳1 Define Rule	2 Set Rule Activation					
Nominee:	Quinn, Floyd	Select				
Assign These Tasks:	AI					
	A	-				
	All Texas State					
	Requisition Approval					
I Want the Nominee to:	Travel Approval					
	PCR Approval	r the duration of your planned				

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

Next 🕨

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)

I♦ 1 Define Rule	2
Nominee: Assign These Tasks:	Quinn, Floyd Select
I Want the Nominee to:	Receive My Tasks
1	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 O Fill In For Me
	If you are unexpectedly absent, the nominee can take over your tasks completely :
Next Cancel	

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



Click

Save

.

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)

Define Rule Set Rule Acti	vation
On saving, turn the rule:: On - 	The rule will be enabled
•	At Once
0	On III
Previous Save Cancel	

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

I	Manage Substitution Rules						
Y) ex in	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		

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 Subst	Create a Substitution Rule					
You can define which t example, when you go unexpectedly absent)	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)					
Define Rule	2 Set Rule Activation					
Nominee:	Piersol, Mark Select					
Assign These Tasks:	PCR Approval					
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					
	If you are unexpectedly absent, the nominee can take over your tasks completely					
Next Cancel						

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 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)				
Define Rule Set Rule Activation				
O At Once				
• On 7/1/2011				
Previous Save Cancel				

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 Appr	val	Haynes, Krista	Fills In For Me	Ongoing	Successful	
All Texas State		Hughes, Ruby	Receives my tasks	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').

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	X			
Row 1 of 4	∑ ≚ Jles			
Row 1 of 4 r	⊻ ≚ Jles Tasks	What To Do	Status	
Row 1 of 4 her Users' Substitution Rusk Owner odgrass, Gregory	¥ ¥ ules Tasks PCR Approval	What To Do Fill In	Status Ongoing	Take over
Row 1 of 4 her Users' Substitution Ro sk Owner odgrass, Gregory Isen, Milton	Tasks PCR Approval PCR Approval	What To Do Fill In Fill In	Status Ongoing Ongoing	Take over End take-over
Row 1 of 4 her Users' Substitution Ruse sk Owner odgrass, Gregory Isen, Milton dreyka, Terrance	Tasks PCR Approval PCR Approval All Texas State	What To Do Fill In Fill In Receive	Status Ongoing Ongoing Ongoing	Take over End take-over

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	2

Quick Tip

https://epdev.jupiter.txstate.edu:50001 -	SAP NetWeaver Portal - Micro	osoft Internet Explorer	
Manage Substitution Rules			
You can view and manage your task substitutio example, in case you are unexpectedly absent) involving you, and you can take over another us	n rules. You can make an assigne . You can create several substitut ser's tasks (if this user has allowe	e receive your tasks, or you ion rules to cover all cases. d you to 'fill in').	i can set an assignee to fill in for you (for You can also see other users' substitution rules
${f \Delta}$ No system could activate this substitution r	je.		Substitution Status
My Substitution Rules			
Create Rule Delete Refresh			
Tasks Assignee	What To Do	Status	Rule Activation

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

Substitution Status			
System	Status	Message	
SAP_ECC_Financials	Failed	Internal error returned by provider: com.sap.netweaver.bc.uwl.substitution.SubstitutionException Fri Jul 20 16:01:22 CDT 2007	
		Error returned from provider:** ERROR ** HK01 - is not authorized for Req. Approval Check log file for details	
		Close	

Substitution Status Error Message - Pop up

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

Accian These Tacks	All	-
Assign mese rasks.	All	

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