Substitution in SAP

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.

<table>
<thead>
<tr>
<th>Task Owner</th>
<th>Jane’s Substitutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane</td>
<td>Bob is Jane’s substitute for Travel</td>
</tr>
<tr>
<td></td>
<td>Sally is Jane’s substitute for PCR’s</td>
</tr>
<tr>
<td></td>
<td>Grace is Jane’s substitute for Requisitions</td>
</tr>
<tr>
<td></td>
<td>Tess is also Jane’s substitute for Requisitions</td>
</tr>
<tr>
<td></td>
<td>Joe is Jane’s substitute for Requisitions, Travel and PCR’s (All Texas State)</td>
</tr>
</tbody>
</table>

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”.

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Click on the button **Create Rule** 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 **Select...** button to search for the substitute.

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 \(\text{Apply}\). 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. \textbf{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.
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.

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

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

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

Note the differences in the Receives My Tasks and the Fills In For Me substitutes.
If you are a substitute for someone else, this will display under Other Users’ Substitution Rules.

The “Fill In” substitute must click the \textbf{Take over} button in order to fill in for the task owner.

The “Fill In” substitute should click the \textbf{End take-over} button when finished filling in for the task owner.

\begin{center}
\begin{table}
\end{center}

\textbf{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”).

\begin{center}
\begin{table}
\end{center}

\textbf{Important!} Click Refresh when you return to the main worklist screen to see the results of Take Over and End Take Over actions.
Quick Tip

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

**Substitution Status**

- **System:** SAP_ECC_Financials
- **Status:** Failed
- **Message:**
  - Error returned from provider: **ERROR** HK01 - is not authorized for Req. Approval. Check log file for details

**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.