‘My Inbox’ User Guide
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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 in the leftmost column to choose an approval item to process.

2. Press Approve or Reject to process your approval decision.

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

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

Enter text from a Task Description to search. Press “X” to clear search.
Filter By *Task Type*:

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

2. Choose task type filter and press ok.

3. Choose one or more task types and press ok.

4. Press the *Clear All Filters* button to remove the filter.
Filter By *My Tasks & Tasks on Behalf Of*
(For scenarios where you’ve been established as an approval substitute)

1. Using the filter options, choose *My Tasks and Tasks on behalf of*, and click ok.

2. Choose one or more people to see the tasks for which you are an approval substitute. Press OK.

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

4. Press the *Clear All Filters* button to remove the filter.
1. Press the **Group** button to bring up the ‘Group By’ option screen.

2. Choose a Group By item (i.e. **Task Type**) and press OK. This grouping will organize tasks by type (i.e. e-NPO, e-PCR, e-IDT, etc).

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

**Group**

With Group, you can further arrange approval items
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. Press **Claim** to reserve a task for your processing only. Claiming is relevant in a group approval situation. Only you will see a claimed task. In addition, as an approval substitute, you can claim a task to remove task visibility from a primary approver.

2. After claiming a task, press **Release** if necessary to make a task visible again to the entire group (or primary approver).
Setting Up a Planned Approval Substitute

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

2. Click on *Manage My Substitutes*.

3. Click on *Add New Substitute* the default substitute type is “Planned”. A planned substitute is an ongoing substitute that always sees tasks in My Inbox as they become available.

4. Enter the name of the person (partial name) to establish as a substitute and click the search icon. Choose the desired name.

5.) Click to choose a Task Group for your new substitute (i.e. *Travel Approval*).
6. The default start date is today. Adjust to a future start date using calendar (if necessary).

7. Choose an end date on the calendar if the substitution is temporary. Press Save.

Note: Established substitutes cannot be edited but they can be deleted. To delete a substitute, click to the left of the name and press delete. Confirm deletion.
Setting Up and 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.

Follow the same initial steps listed under ”Setting up a Planned Approval Substitute” (pg. 10) except this time, chose Unplanned and press Add new substitute.
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.