

SBWP - Workflow Substitution

Situation A: The workflow approver is going on vacation for a week and would like to set up a substitution for their inbox (see 'Active Workflow Substitute').

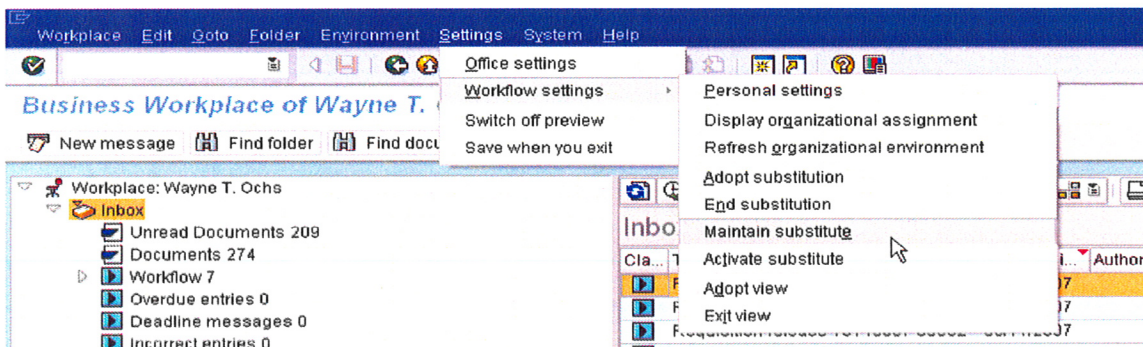
Situation B: The workflow approver's assistant should always have access to the approver's inbox in order to substitute when necessary (see 'Passive Workflow Substitute').

There are two options for setting up workflow substitutes. The substitute can either be maintained as an active or passive substitute.

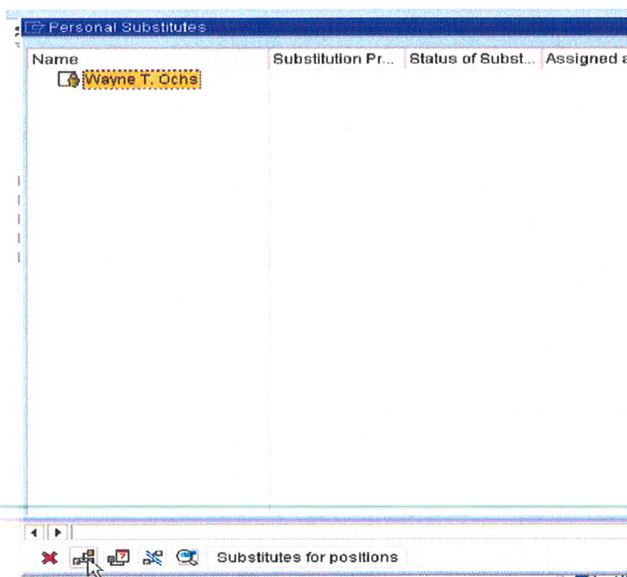
- Active = A date range must be indicated and the substitute will only see the approver's inbox items for as long as the date indicated.
- Passive = No specific date range is provided and the substitute can activate their substitution for that approver whenever they desire.

Active Workflow Substitute

1. Transaction SBWP (or Inbox icon). Click on the following menu path: Settings < Workflow Settings < Maintain substitute.

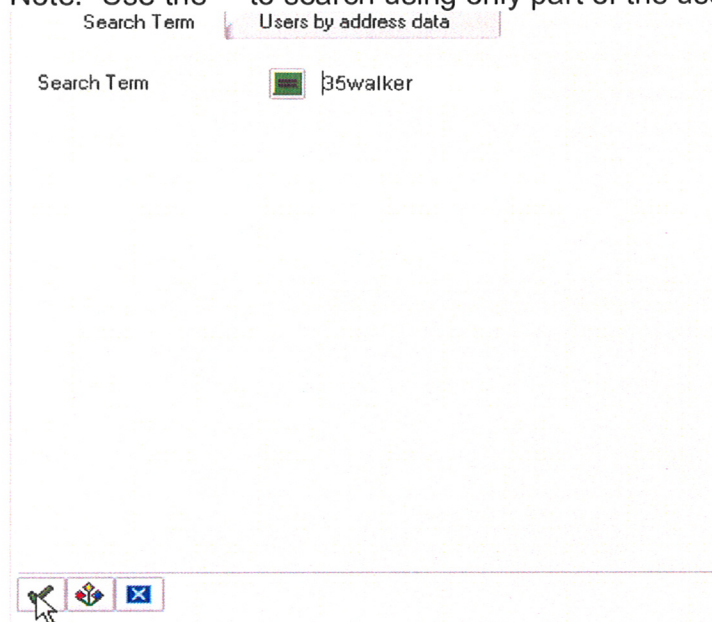


2. Click on your name and click on the icon shown below to create a substitution.



3. Enter the user id of the substitute individual and click on 'Start Search' as shown.

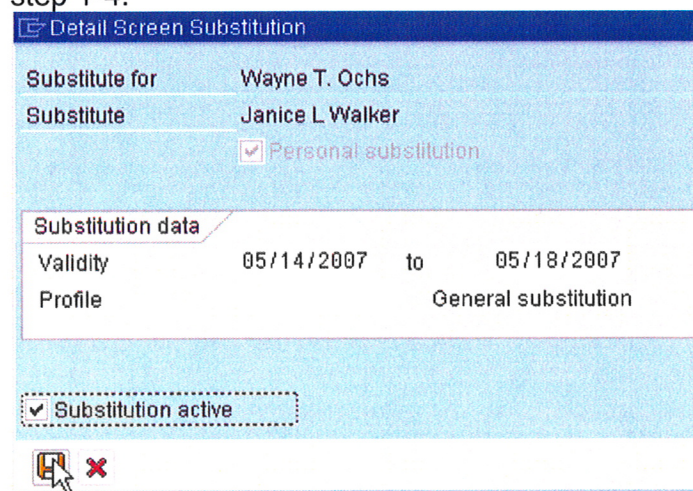
Note: Use the '*' to search using only part of the user's name. I.e. *walker*



- If only one id is found it will bring you immediately to step 4, however if more than one choice exist you will have to select the correct id and then proceed to step 4.

4. Fill out the date of your leave and click on the checkbox 'Substitution active' followed by 'Save'.

Note: More than one person can be set up as the active workflow substitute by repeating step 1-4.

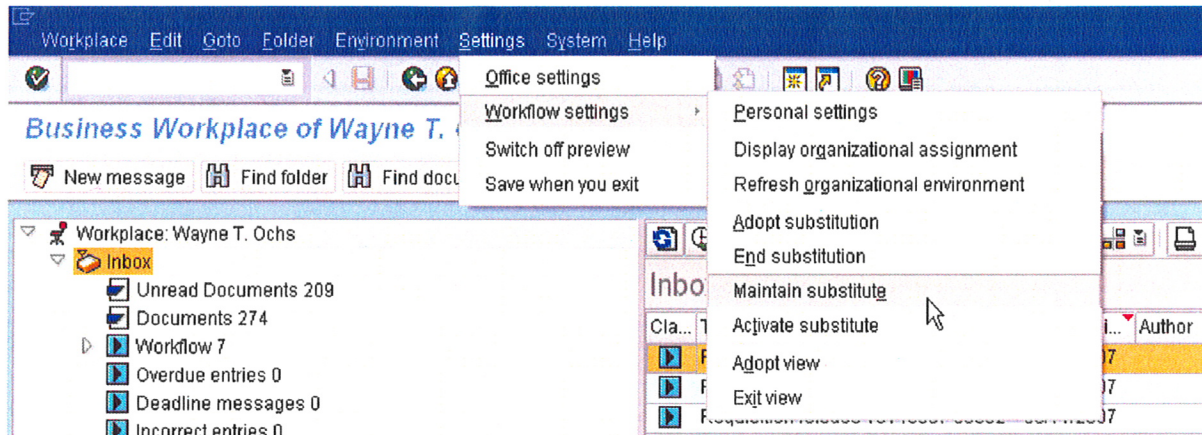


5. When the substitute logs into their inbox, the items from the approver inbox will also be seen along with their own inbox items.

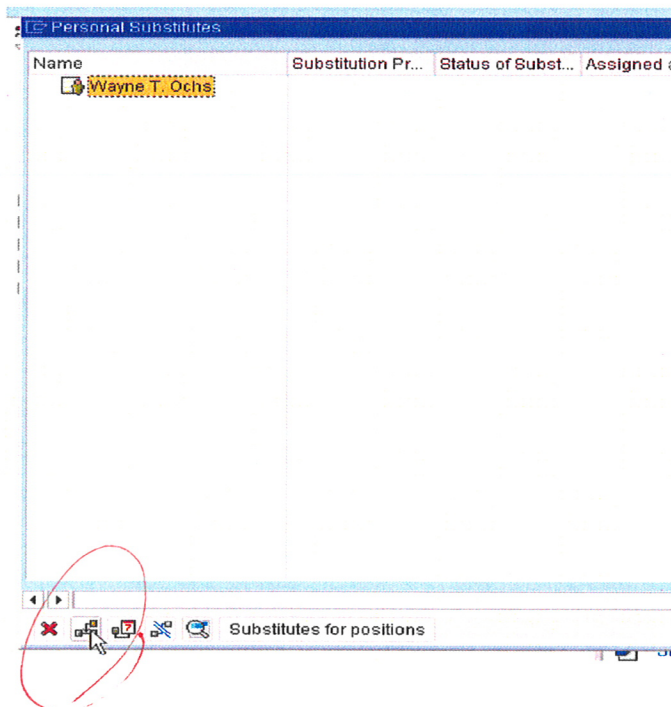
Passive Workflow Substitute

Steps performed by approver:

1. Transaction SBWP (or Inbox icon). Click on the following menu path: Settings < Workflow Settings < Maintain substitute.

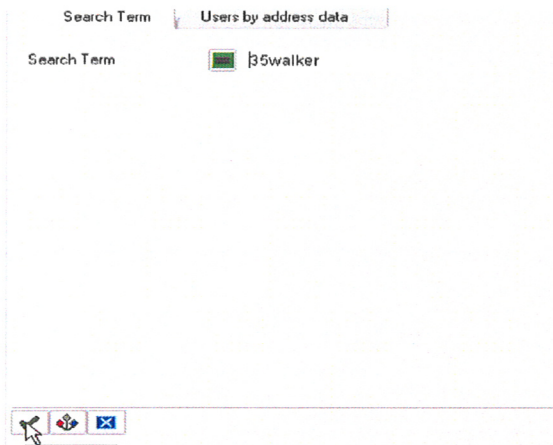


2. Click on your name and click on the icon shown below to create a substitution.



3. Enter the user id of the substitute individual and click on 'Start Search' as shown.

Note: Use the '*' to search using only part of the user's name. I.e. *walker*

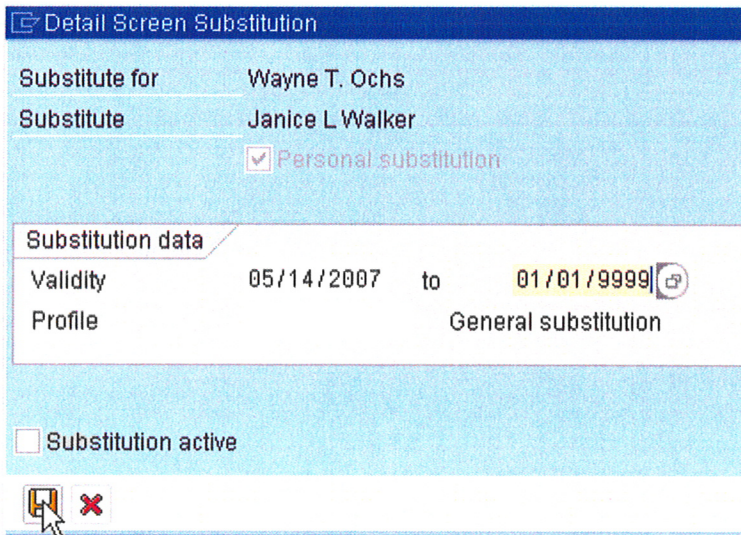


The screenshot shows a search interface with a dropdown menu set to 'Users by address data'. Below it, a search term 'j35walker' is entered into a text field. At the bottom of the window, there are navigation icons: a mouse cursor, a refresh icon, and a close icon.

- If only one id is found it will bring you immediately to step 4, however if more than one choice exist you will have to select the correct id and then proceed to step 4.

4. Enter beginning date as today's date and ending as '01/01/999' and click on 'Save'.
Do not check the box 'Substitution active'.

Note: More than one person can be set up as the passive workflow substitute by repeating step 1-2.



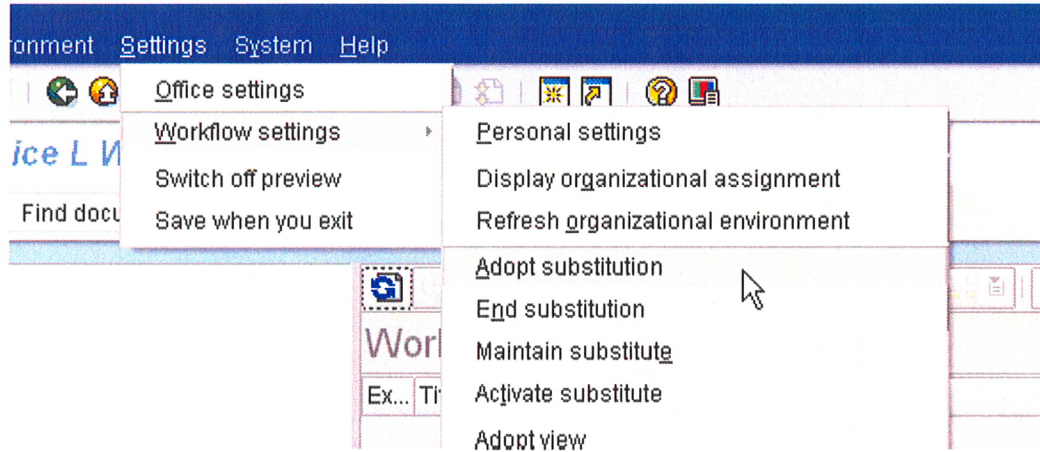
The screenshot shows a 'Detail Screen Substitution' form. It has a blue header with a back arrow icon. The form contains the following fields and options:

- Substitute for:** Wayne T. Ochs
- Substitute:** Janice L Walker
- Personal substitution**
- Substitution data:**
 - Validity:** 05/14/2007 to 01/01/9999 (with a calendar icon)
 - Profile:** General substitution
- Substitution active**

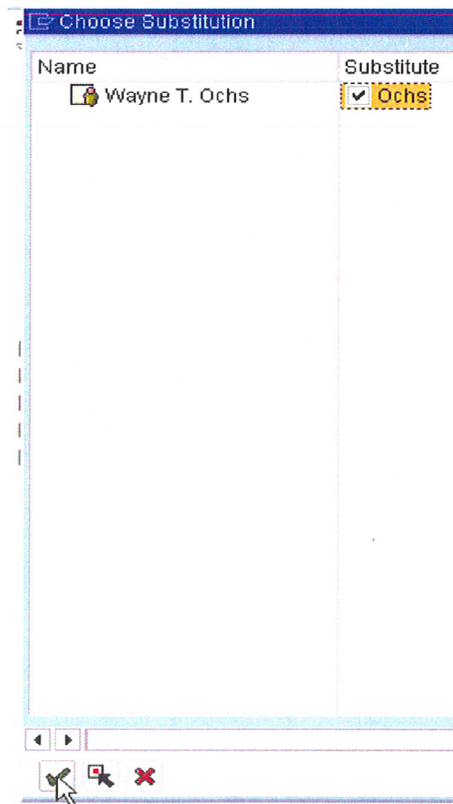
At the bottom of the window, there are navigation icons: a mouse cursor, a refresh icon, and a close icon.

Steps performed by the substitute:

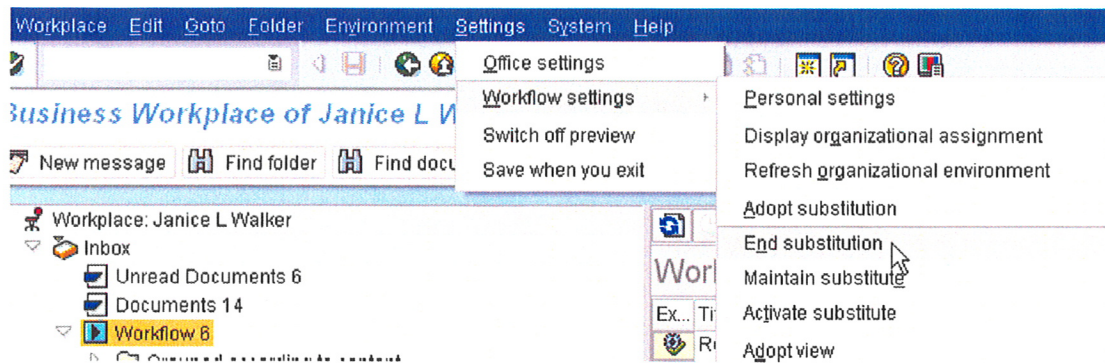
1. When the substitution individual logs into their workbox they will not see anything immediately. When they are ready to review the approver's inbox they click on the following menu path: Settings < Workflow settings < Adopt substitution.



2. Click on the checkbox beside the approver you would like to substitute for and click on 'Enter'.



3. When the substitute no longer wants to review the approver's inbox, click on the following menu path: Settings < Workflow settings < End substitution.



Additional Notes:

- The user assigned as a substitute must also have the same release code role as the approver they are approving on behalf of.
- If substitution was not set up before the approver left, the backup individual (substitute) can still approve on behalf of the approver using transaction ME54N or ME55.