Establishing Substitute Approvers for your Business Workplace

Purpose
Substitute approvers are key to allowing the flow of responsible work flow items (ISRs, ZSRs, Supply Chain, Travel, etc) to continue in the event the original approver is not available. Substitutes should be identified as another individual with the authority and ability to review work flow items for validity for the same areas as the original approver. Substitutes must have identical access as original approver.

There are 2 types of Substitutes:

- **Active:** Will receive work flow items in their own inbox as well as the original Approver.
- **Passive:** Will have to proactively adopt the initiators inbox to see workflow items. The passive approver will continue to see workflow until the substitution is ended.

There are 2 ways to establish substitute approvers:

- Option 1: In Business Workplace workflow settings
- Option 2: ZSR Transaction

**Substitute approvers will have access to ALL items that come to your Business Workplace that they have the same access to approve. (ISRs, Travel, Supply Chain, ZSRs).**

Associated Roles
 ISR Approver: ZRHR_PA_ISRAPPROVE_ALL
 ZSR Role: ZRSE_ONE_STOP_SHOP_REQ

Process Instruction

Option 1: In Business Workplace workflow settings

**Establishing a Substitute**

1. Access your Business Workplace
2. Settings
3. Workflow Settings
4. Maintain Substitute
Establishing Substitute Approvers for your Business Workplace

5. Click on your name in pop up box
6. Click create substitute icon at bottom of pop up box

7. Two search options are available in the pop up box
   a. Search Term
      i. enter JHED ID of substitute
      ii. Can retrieve either via email address or JHED

   b. Users by Address Data
      i. You can search by last name and first name

8. Click on green check to execute search
9. Search results will show in the pop up box
Establishing Substitute Approvers for your Business Workplace

10. Click on the name of the person you are selecting as your substitute to highlight it
11. Click green check in top left of search results
12. New pop up box appears to enter specifications of the substitutes access
   a. Validity – can enter substitute to only be active for a period of time. *(Please note that you will not receive any notification in SAP to set up another substitute when this one ends)*
   b. Profile- do not enter data in this field
   c. Substitution Active- by the definitions above for the 2 types of Substitutes; if you want the substitute to be active click in this box. If this box is not check substitute will default to passive and need to follow directions below to view ISRs for approval.
   d. Once data is complete click on save icon in the lower left of pop up box

13. Completion message “Relationship Created” appears
14. Green check in pop up box to exit process

**Passive Substitute: Changing Inboxes**

**Moving to the Original Approvers Inbox**

1. Access your Business Workplace (inbox for ISRs)
2. Settings
Establishing Substitute Approvers for your Business Workplace

3. Workflow Settings  
4. Adopt Substitution

[Image of a computer screen showing the adoption of substitution settings]

5. Pop up box
   a. Click in radio button next to name of person you wish to see their inbox

   ![Image showing the pop-up box with the name of the person being substituted and the substitute name]

   *the name of the person you are substituting for appears where it says HR ISR Test ID in this screen shot

   b. Green check in the lower left of the pop-up box

6. Inbox will now reflect the original approvers ISRs

To restore your own inbox
1. Access your Business Workplace (inbox for ISRs)
2. Settings
3. Workflow Settings
4. End Substitution

[Image of a computer screen showing the settings menu with the end substitution option highlighted]

5. Inbox will now reflect your own ISRs
Establishing Substitute Approvers for your Business Workplace

Option 2: ZSR Transaction

1. Enter ZSR in the transaction window of your SAP Easy Access screen
2. Enter in either your employees User ID or Position Number of the person who needs to have a substitute approver (preferred: position number)
3. Then select “Workflow Substitute” in the drop down menu

4. Enter in the substitutes:
   a. USER ID (Jhed ID)
   b. Start and End dates of the substitution (recommended time frame: 6 months)
   c. Select either Active or Passive approver
   d. System: ECC/SRM or Both (recommend Both)
5. If you wish to delete any substitute approvers you can do so in this screen as well

6. Select Save and then Submit Request

Contact HR Shared Services at 443-997-5828