

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

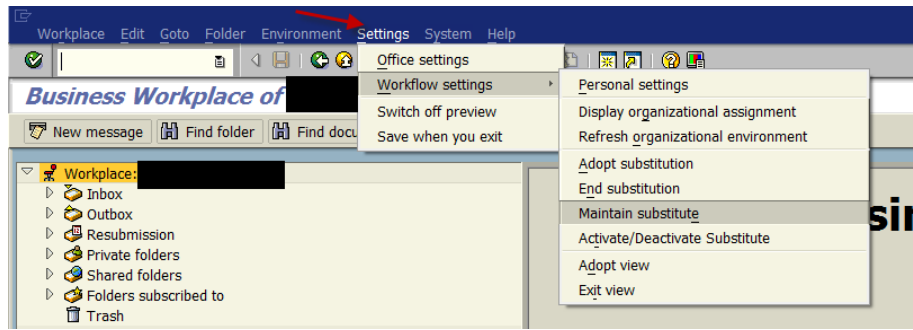
Process Instruction


Option 1: In Business Workplace workflow settings

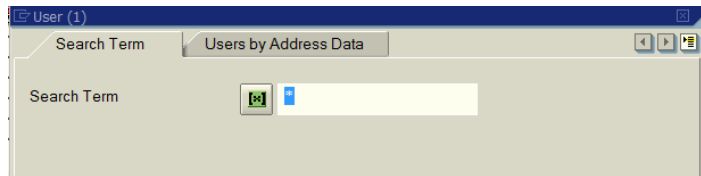
Establishing a Substitute

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

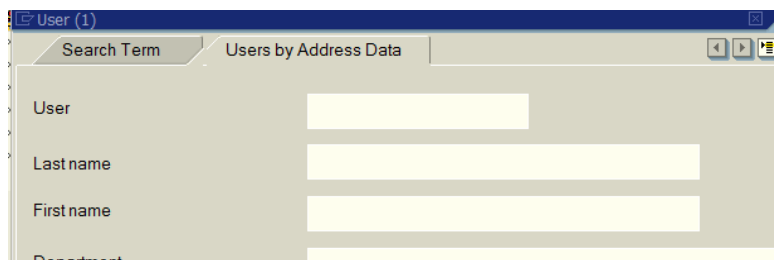
Establishing Substitute Approvers for your Business Workplace



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

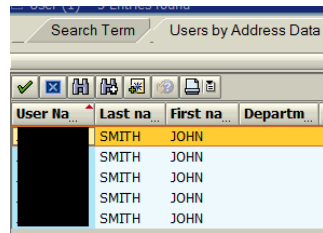


- b. Users by Address Data
 - i. You can search by last name and first name

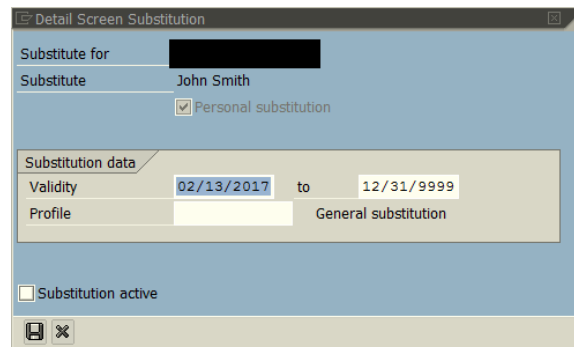


8. Click on green check to execute search
9. Search results will show in the pop up box

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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

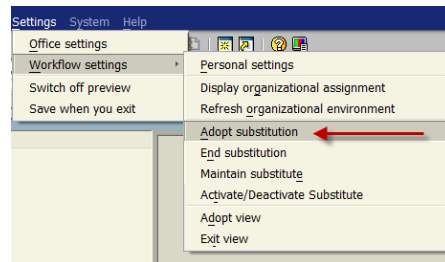
Passive Substitute: Changing Inboxes

Moving to the Original Approvers Inbox

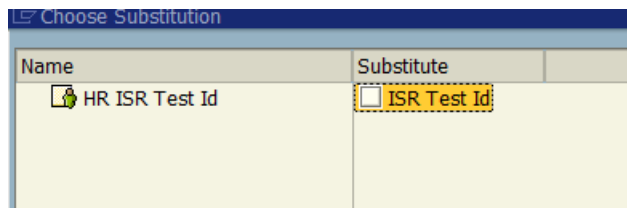
1. Access your Business Workplace (inbox for ISRs)
2. Settings

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3. Workflow Settings
4. Adopt Substitution



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

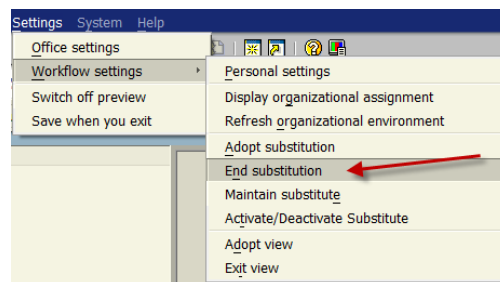


*the name of the person you are substituting for appears where it says HR ISR Test ID in this screen shot

- 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



5. Inbox will now reflect your own ISRs

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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

The screenshot shows two SAP transaction screens. The top screen, titled "User Selection", has a header "User Selection" and a blue instruction: "Enter the USER ID or the Position you want to assign security to". It contains three radio buttons: "USER ID", "Position" (which is selected), and "ZSR Request Number". To the right of these are three input fields; the middle one contains the text "12345678". The bottom screen, titled "Action", has a header "Action" and a blue instruction: "Select which type of action you want to perform". It contains a label "Select an action" and a dropdown menu with "Workflow Substitute" selected and highlighted in yellow. A clipboard icon is visible to the right of the dropdown.

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)

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5. If you wish to delete any substitute approvers you can do so in this screen as well

The screenshot displays two tables within a software interface. The top table, titled 'Current Substitutes', has columns for USER ID, Name, System, Start Date, End Date, Active/Passive, and Delete. The bottom table, titled 'Add Substitute', has columns for USER ID, Name, Org Unit, Start Date, End Date, Active/Passive, and System. Both tables have a yellow highlight on the first row.

USER ID	Name	System	Start Date	End Date	Active/Passive	Delete
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

USER ID	Name	Org Unit	Start Date	End Date	Active/Passive	System

6. Select Save and then Submit Request

Contact HR Shared Services at 443-997-5828