

Introduction

The following instructions will walk you through the process of designating a Substitute Approver through your **Universal Worklist** in the **ERP Portal** for SAP functions for Finance and HR.

Logging in to the ERP Portal

From the M-DCPS Web site at <u>http://www.dadeschools.net</u>,

- ▼ Log in to the Employee Portal to access the ERP Portal
- ▼ Click on the SAP Badge
- ▼ Click on Universal Worklist

The **Universal Worklist** will be displayed.

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- ▼ Click drop-down icon (Icons my look like this for some users
- ▼ Click Manage Substitution Rules

The Manage Substitution Rules will be displayed.

Creating a Substitution Rule

The task substitution rules can be viewed and managed from this screen. You can set up an assignee to receive some or all of your tasks or to fill in for you (unexpected absence). Several substitution rules can be created to cover all cases. You can also view other users' substitution rules involving you, and you can take over another user's tasks, if this user has allowed you to fill in.



To create a rule, under the My Substitution Rules,

ou can view and ma ase you are unexpe	stitution Rules inage your task substitut ctedly absent). You can other user's tasks (if this	create several substitu	tion rules to cover all cases. You can a	ou can set an assignee to fill in for you Iso see other users' substitution rules i	(for example, nvolving you, a
My Substitution R	NIP				
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Other Users' Subs	titution Pules				
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▼ Click Create Rule

In the **Nominee** text box,

sk - SAP NetWeaver Port	al - Windows Internet Explorer	_0_
Create a Subs	titution Rule	
	sks you want to assign to a nominee. You can either make the nominee receive your tasks (for example,), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)	
Define Rule S	et Rule Activation	
Nominee:	Select	
Assign These Tasks:	All	
	The nominee is the substitute for all tasks	
I Want the Nominee to	Receive My Tasks	
	You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule \bigcirc Fill In For Me	
	If you are unexpectedly absent, the nominee can take over your tasks completely	
Next Cancel		



Employee number of substitute designee



From the Assign These Tasks drop-down menu,

isk - SAP NetWeaver Port	al - Windows Internet Explorer	
Create a Subst	titution Rule	
	sks you want to assign to a nominee. You can either make the nominee receive your tasks (for example,), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)	
when you go on vacation	, or you can allow the nonlinee to lin in for you (or example, in case you are unexpectedly absent)	
1		
Define Rule S	et Rule Activation	
Define Rule 5	et Rule Activation	
Nominee:	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Assign mese lasks.		
	Functional	
	Disciplinary	
I Want the Nominee to:	Strictly confidential	
	Strictly confidential he duration of your planned absence; in the next step you	
	Shopping Cart Approval	
	Bid Approval nee can take over your tasks completely	
	Purchase Requisition	
	AR Invoice/Credit Memo	
Next Cancel	Fund Budget Document	
		1050/
	Local intranet 🖓 🗣	125%

▼ Click the appropriate task assignment(s). You can specify which task you would like to assign to the substitute approver. The All Tasks selection will assign all of your tasks to the substitute approver.

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Create a Subs	titution Rule	
	sks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, n), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)	
)	2	
Define Rule S	Set Rule Activation	
Nominee:	XXXXXXX Select	
Assign These Tasks:	Short pproval	
I Want the Nominee to:	Restive My Tasks	
	You hand over tasks to the assignce for the duration of your planned absence; in the next step you can set a start date for this rule Fill In For Me	
	If you are unexpectedly absent, the nominee can take over your tasks completely	
Next		

▼ Click Receive My Tasks (You hand over your tasks to the assignee for the duration of your planned absence and set a start date for this rule in the next step.)

or,

- ▼ Click Fill In For Me (If you are unexpectedly absent, the substitute can take over all of your tasks completely.)
- ▼ Click Next



To set the rule for activation,

Create a Subs	asks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you
can allow the nominee	to fill in for you (for example, in case you are unexpectedly absent)
1	2
Define Rule S	et Rule Activation
On saving, turn the rule	• On - The rule will be enabled
on saving, tail the fale	• At Once
	Off - The rule will not be enabled
You can turn the rule o	n or off at any time on the Substitution Rules Management screen.

To make this person a substitute immediately,

▼ Click At Once

If the substitution begins on a specific date,

- ▼ Click On
- ▼ Click on the calendar icon and select start date
- ▼ Click Save

The substitute approver information will be displayed.

You can create several subs	titution rules to cover all cas	our tasks, or you can se es. You can also see o	et an assignee to fill in for yo ther users' substitution rules	u (for example, in involving you, and
esh	К.			
Nominee	What To Do	Status	Rule Activation	
SAMPLE EMPLOYEE	Receives my tasks	Starts 7/26/10	Problems reported	Turn Off
Tasks	What To Do		Status	
	You can create several subs ks (if this user has allowed y sh Nominee SAMPLE EMPLOYEE	You can create several substitution rules to cover all cas ks (if this user has allowed you to 'fill in').	You can create several substitution rules to cover all cases. You can also see o ks (if this user has allowed you to 'fill in'). Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can also see o Image: share of the several substitution rules to cover all cases. You can all cases to cover all cases to cover all cases to cover all cases. You can all cases t	Nominee What To Do Status Rule Activation SAMPLE EMPLOYEE Receives my tasks Starts 7/26/10 Problems reported

Return to this screen to **Turn Off** a person's substitute role, edit the rule, or add another substitute to your tasks.



To exit the **ERP Portal**,

▼ Click

to close the **Substitution Rules** screen

▼ Click on Log off in the upper right screen

Whom to Contact for Assistance

For questions or comments, please submit a *Self Service* incident at: <u>http://ism.dadeschools.net/HEAT/Default.aspx</u>

