# Assigning a Substitute Approver for SAP

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.
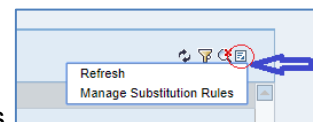
Logging in to the ERP Portal

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

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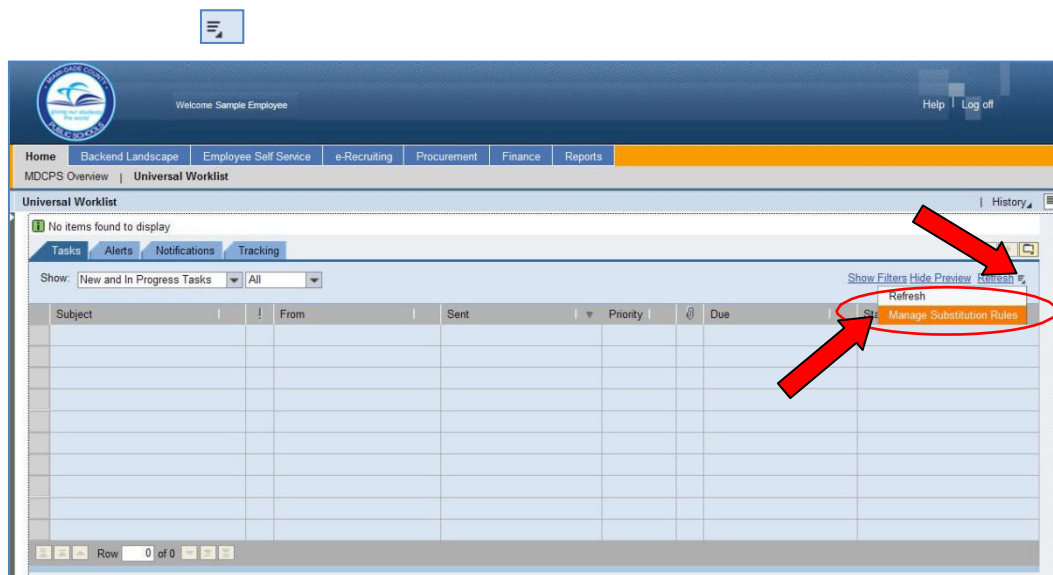
▼ **Click** drop-down icon (Icons my look like this for some users
▼ **Click** **Manage Substitution Rules**

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**,
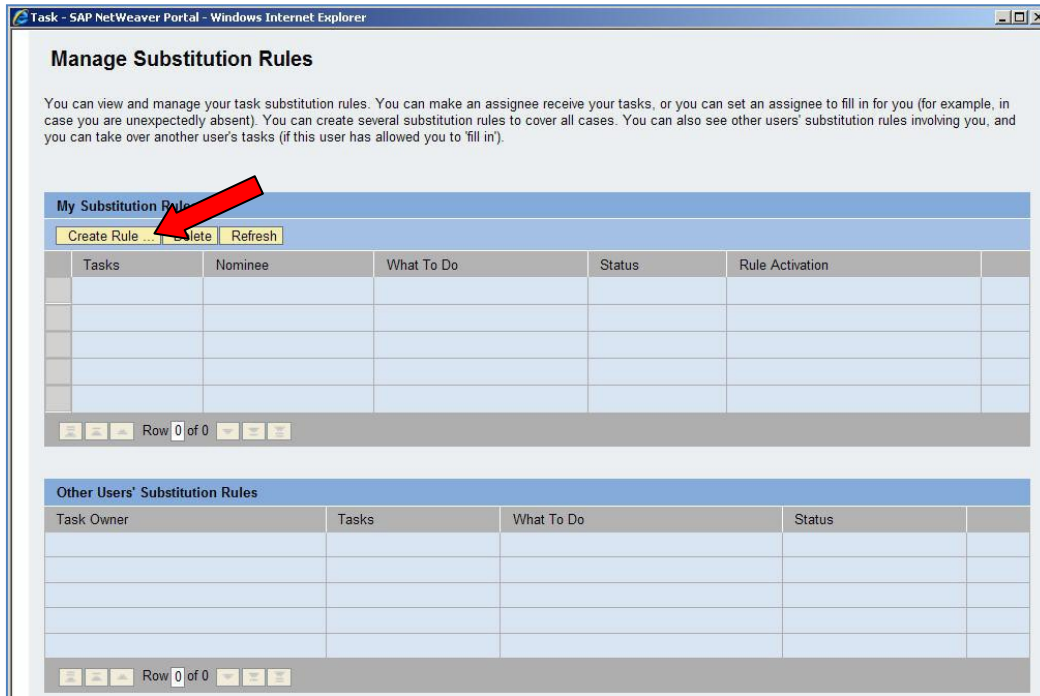
▼ **Click Create Rule**

In the **Nominee** text box,

▼ **Type** **Employee number** of substitute designee

From the **Assign These Tasks** drop-down menu,
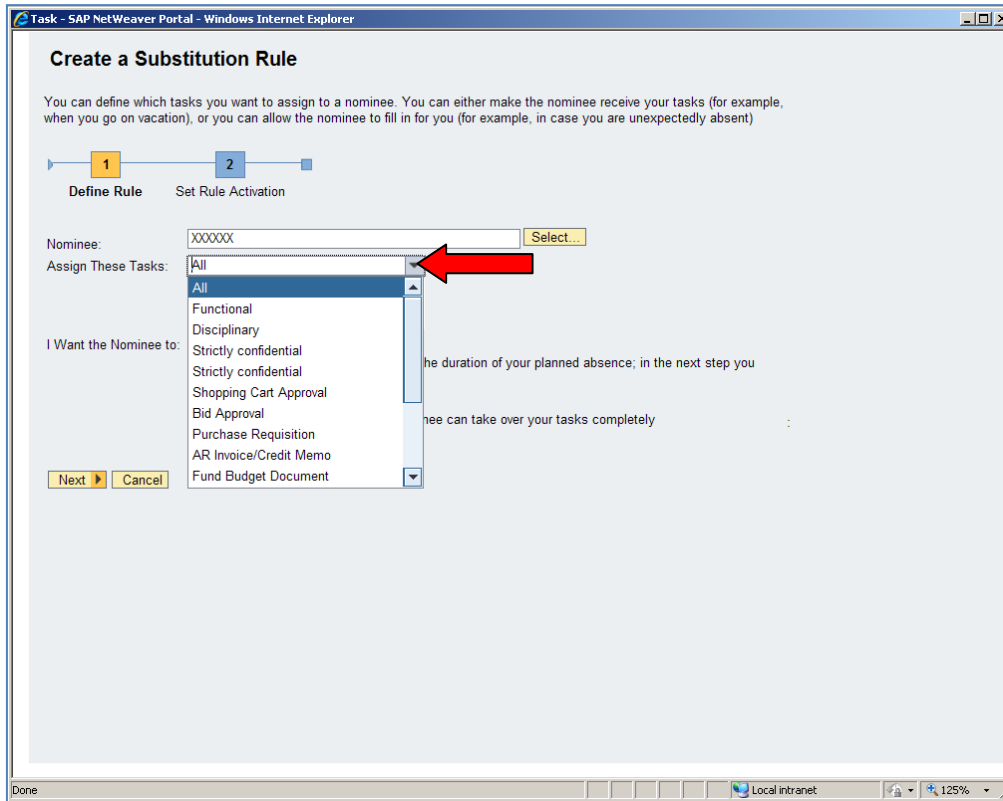
▼ **Click** the appropriate task assignment(s). You can specify which task you would like to assign to the substitute approver. The **All Tasks** selection will assign all of your tasks to the substitute approver.

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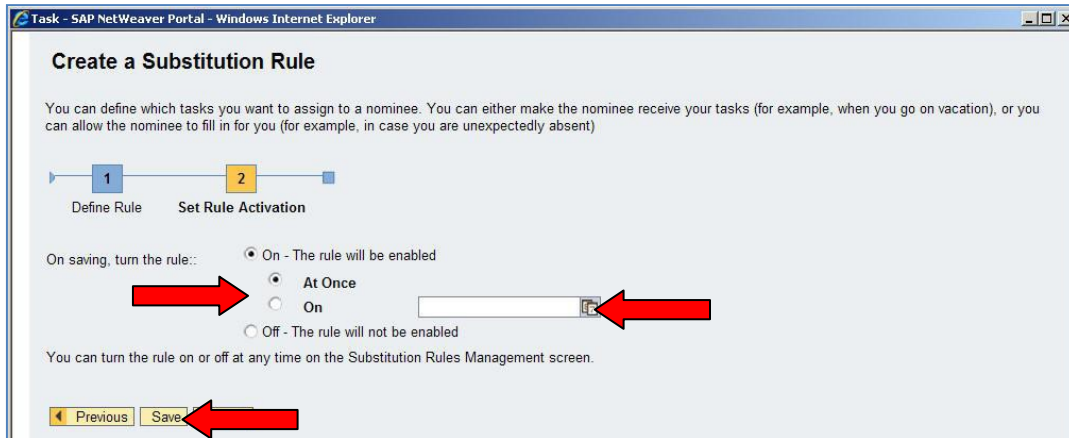
▼ **Click**   **Fill In For Me** (If you are unexpectedly absent, the substitute can take over **all** of your tasks completely.)

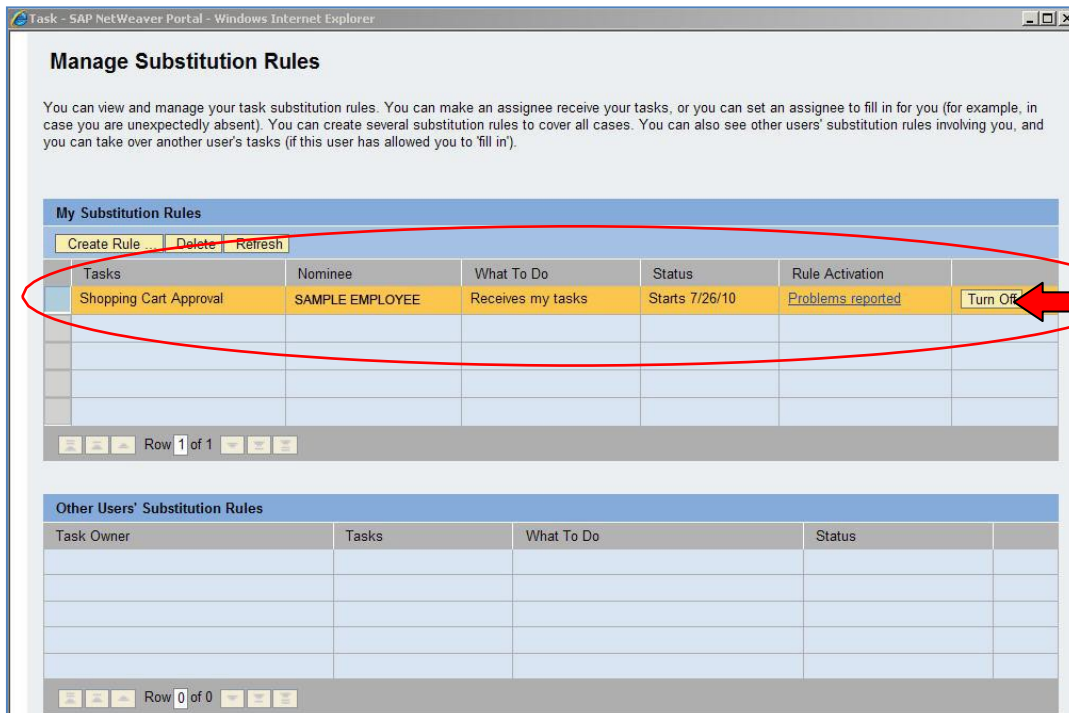▼ **Click**   **Next**

To set the rule for activation,

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.

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:
http://ism.dadeschools.net/HEAT/Default.aspx