

Work Instruction

SBWP - Create Substitute (Document)

SBWP

Purpose

Use this procedure to create a personal substitute for workflow.

Trigger

Perform this procedure if you regularly receive work items in your SAP Workplace inbox. You must establish at least one substitute who may act upon work items in your inbox in your absence.

Menu Path

This transaction is accessed via an icon on the SAP Easy Access menu. The instructions below will show you the icon to be used.

Transaction Code

SBWP

Helpful Hints

- Your personal substitute will see all of your items. He/she cannot be designated for only a particular type of item or area of the organization. Therefore, before someone can be your substitute, you should ensure that they have the appropriate system authorizations necessary to act upon your items.
- Refer to University Fiscal Policy FI 0150 for requirements of delegating departmental approval.
- If a primary user is away from the office for an extended period of time, and therefore unable to create a substitute personally, it is possible to create one for the user in his or her absence.



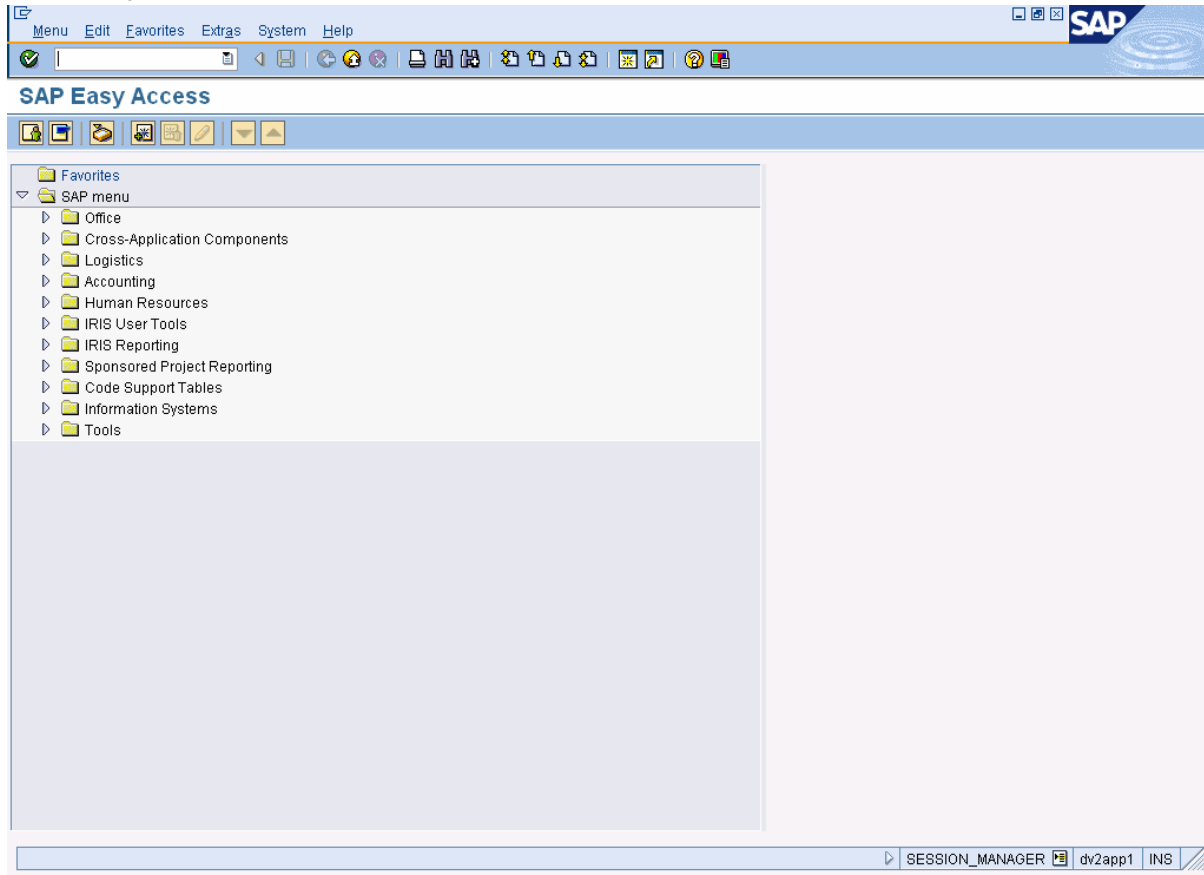
For instructions on creating a substitute, see the lesson [ZSEDEPTAUTH000 Requesting Substitutes for Workflow.](#)


- Substitutes can only adopt work items that are directly routed to the person for whom they are a substitute. If you are a substitute for a user (user A) who has been made a substitute for another user (user B), you will only see work items for user A. You will not see work items for user B.

Procedure

1. Start the transaction from the SAP Easy Access menu screen.

SAP Easy Access



2. Click  (**SAP Business Workplace**) on the Application toolbar. Your *Business Workplace* screen will be displayed.

Business Workplace of DEPTMGR01

The screenshot shows the SAP Business Workplace interface for DEPTMGR01. The main window displays a list of workflow items under the heading "Workflow 60". The list includes columns for Ex., Title, Status, Creation D..., Creation ..., Att..., and Co. The first item is "Approve Budget Document UT 2008 500001052" with a status of "Approved" and a creation date of 07/09/2007. Below the list, a detailed view of the selected item is shown, including a description and objects and attachments.

Ex.	Title	Status	Creation D...	Creation ...	Att...	Co.
1	Approve Budget Document UT 2008 500001052	Approved	07/09/2007	16:48:51	5	
2	Approve Budget Document UT 2007 500002021	Approved	07/02/2007	11:26:26	5	
3	Approve Budget Document UT 2008 500000000	Approved	07/02/2007	09:29:31	5	
4	Approve Budget Document UT 2007 500002019	Approved	06/28/2007	16:11:14	5	
5	Recurring Pay for	Approved	06/27/2007	16:31:24	5	
6	Invoice 5105601522 2007 DELL MARKETING LP	Approved	06/26/2007	08:47:10	5	
7	Invoice 5105601521 2007 DELL MARKETING LP	Approved	06/26/2007	08:42:02	5	
8	Trip 1700000814 17 Request of Duck, Daffy	Approved	05/16/2007	17:22:47	5	
9	Trip 1700000813 17 Request of Duck, Daffy	Approved	05/16/2007	17:22:02	5	
10	Trip 1700000812 17 Request of Duck, Daffy	Approved	05/16/2007	17:21:02	5	
11	Trip 1000000314 03 Expenses for Chao, Janet	Approved	05/07/2007	16:50:25	5	
12	Trip 1000000313 03 Expenses for Chao, Janet	Approved	05/07/2007	16:47:51	5	
13	Trip 1000000312 03 Expenses for Chao, Janet	Approved	05/07/2007	16:46:00	5	
14	Trip 1000000311 03 Expenses for Chao, Janet	Approved	05/07/2007	16:25:32	5	

Approve Budget Document UT 2008 500001052

Description
Double-click (execute) this work item and three buttons will be displayed in the Preview Area of Workplace. Click

Objects and attachments


- Budgeting Entry Doc: 0500001052



- On the main menu bar, select **Settings** → **Workflow settings** → **Maintain substitute**. The *Personal Substitutes* pop-up window will be displayed, showing your user ID in the *Name* column.



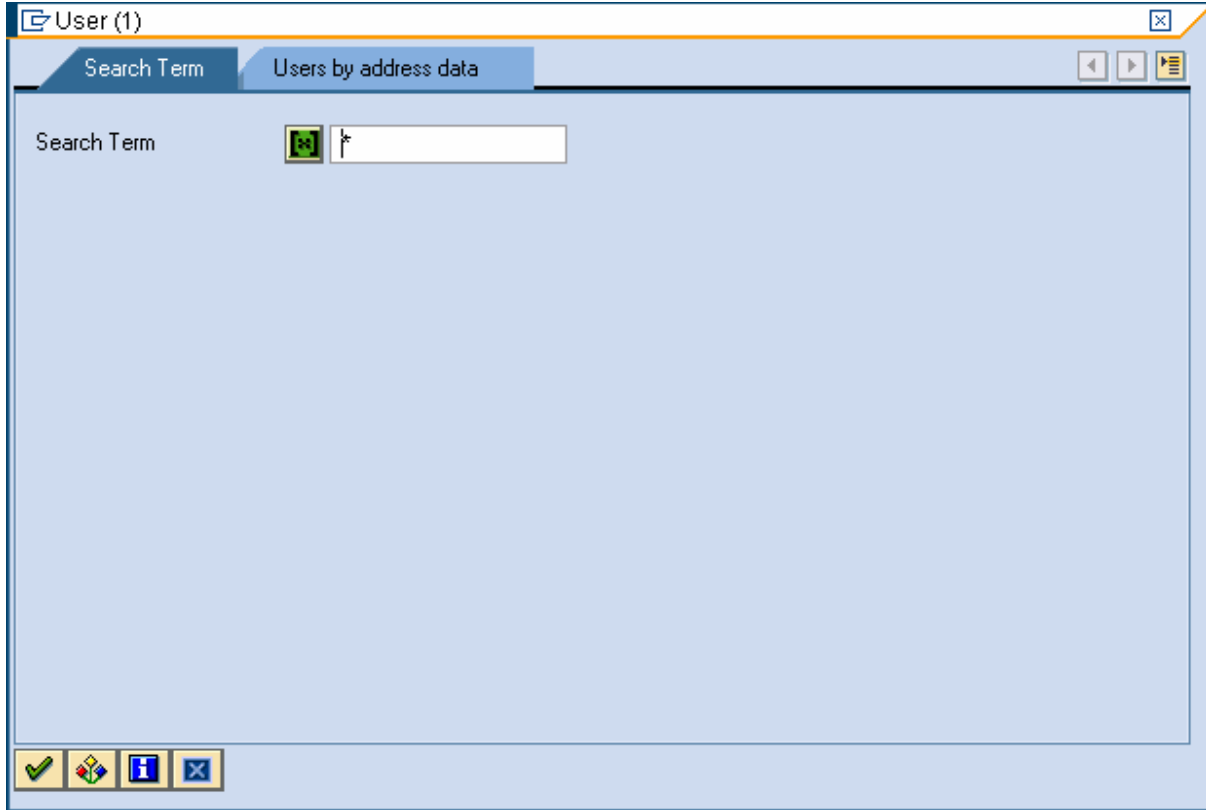
If you already have any personal substitutes set up, they will be listed below your user ID.

Personal Substitutes


Name	Substitution Pr...	Substitute Stat...	Assigned as...	Assigned ...
 DEPTMGR01				


4. Click on your name to highlight it. In this example, the user's name is DEPTMGR01. Click  DEPTMGR01 .
5. Click  (**Create substitute**). The *User* search screen will be displayed.

User (1)




6. As required, complete/review the following fields:

Field Name	R/O/C	Description
Search Term	R	<p>A string of letters and/or numbers contained in the name of the object for which you are searching.</p> <p>Example: subs*</p> <p> For this particular search, the value you enter will be used to search for the ID of the substitute user.</p> <p>The “wild card” example above will return all user IDs beginning with “subs.”</p>

7. Click  (**Start search**). All users matching the value you entered in *Search Term* will be displayed.



User (1) 1 Entry found


Object ab...	Object name	Start date	End Date
User	Substitute User	01/01/1900	12/31/9999

8. Click on the line for the appropriate user ID and click  **(Copy)**. The *Detail Screen Substitution* pop-up window will be displayed.

Detail Screen Substitution

9. As required, complete/review the following fields:

Field Name	R/O/C	Description
Validity	R	<p>The date on which the setting will become active.</p> <p> This will be the date on which your substitute will be able to view items in your inbox. Since the setting defaults to the current date, you should not change the value if you want the substitution to take effect immediately.</p> <p>Example: 08/01/2007</p>
to	R	<p>The date until which the setting will be active.</p> <p> This will be the date on which the substitution will expire. The setting defaults to 12/31/9999, indicating that the substitution is active indefinitely. However, if you want the substitution to be active for a specified period of time, you may change this date.</p> <p>Example: 12/31/9999</p>

Field Name	R/O/C	Description
<input type="checkbox"/> Substitution active	O	<p>It is recommended to leave the “Substitution active” box unchecked for system performance reasons. A check in this box indicates that the substitution is “permanent.” Leaving the box unchecked indicates an “as-needed” substitute. A “permanent” substitute will automatically receive the primary user’s work items in their own inbox. An “as-needed” substitute must manually adopt the work items from the primary user’s inbox.</p> <p> For information on manually adopting work items, see document SBWP – Adopt Substitution.</p>

The completed *Detail Screen Substitution* window is shown below.

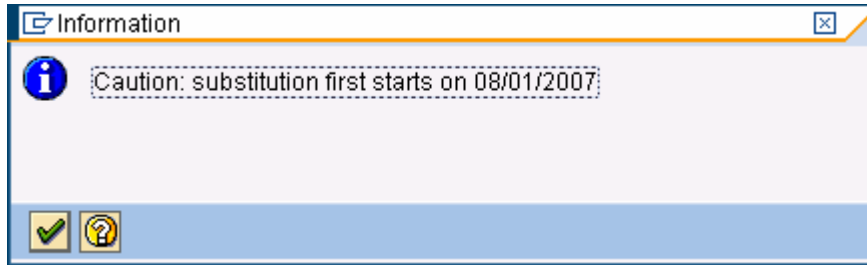
Detail Screen Substitution


10. Click  (Save).



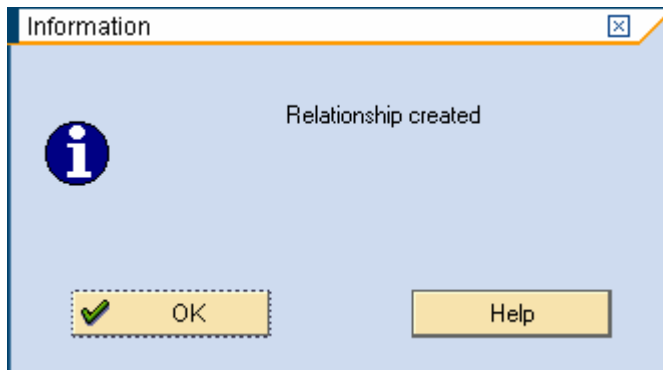
If the substitution is set to begin in the future, you will see a message like the one below. If you use the default value of the current date, you will not see this message.

Information



11. Click  (**Continue**). You will see a message at the bottom of the screen that the substitution relationship was created.


Information



The *Personal Substitutes* screen will now show the newly create substitute will be listed beneath your ID.

Personal Substitutes

Name	Substitution Pr...	Substitute Stat...	Assigned as...	Assigned ...
DEPTMGR01				
Substitute User	General substituti	Deactivated	08/01/2007	Unlimited

12. Click  (**Continue**) to leave the *Personal Substitutes* screen and return to the Business Workplace.

Business Workplace of DEPTMGR01

The screenshot shows the SAP Business Workplace interface for DEPTMGR01. The main window displays a list of workflow items under the heading 'Workflow 60'. The selected item is 'Approve Budget Document UT 2008 500001052'. Below the list, the details for this item are shown, including a description and objects and attachments.


Ex...	Title	Status	Creation D...	Creation ...	Att...	Co.
	Approve Budget Document UT 2008 500001052		07/09/2007	16:48:51	5	
	Approve Budget Document UT 2007 500002021		07/02/2007	11:26:26	5	
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	Approve Budget Document UT 2007 500002019		06/28/2007	16:11:14	5	
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Approve Budget Document UT 2008 500001052

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Objects and attachments

- Budgeting Entry Doc: 0500001052

13. Click  (Exit) to return to the SAP Easy Access menu.

14. You have completed this transaction.

Result

You have now set up a personal substitute.

Comments



For assistance, contact the IRIS Helpdesk at irishelpdesk@tennessee.edu.