

Work Instruction

ZSUBS - Workflow Substitutes Report (Document)

ZSUBS

Purpose

Use this procedure to list (1) the personal substitutes for a specified workflow agent or (2) all of the agents for whom a specified person serves as a substitute.



Approvers and reviewers are both types of workflow agents. Both approvers and reviewers can have personal substitutes. **ZSUBS** works identically for both approvers and reviewers so the term “agent” will appear in this document to generically refer to both approvers and reviewers.

Trigger

Perform this procedure when you need to see:	Examples
All personal substitutes for a specified agent	If the primary agent is not available for some reason, e.g., a vacation or personal emergency, you can use this report to find out who can process work items on his/her behalf. If a primary agent is leaving the university, you may want to temporarily establish the substitute as a primary agent until the primary agent’s position is filled.
What type of substitute a user is set as (permanent or as-needed)	If a substitute is experiencing problems accessing work items from the agent’s inbox, knowing the type of substitute will help troubleshoot the problem.
All of the agents for whom a user is set as a personal substitute	If a substitute is leaving the university, you may need to see which agents for whom he/she is set as a personal substitute so that someone else can be designated to serve as a personal substitute for those agents.

Prerequisites

Anyone who needs to be set as a personal substitute for a Department Head must meet the requirements set forth in policy FI 0150.



For more information on policy FI 0150, see the university’s policy website, <http://www.tennessee.edu/policy> and select the link for “Fiscal Policies”.

Menu Path

Use the following menu path(s) to begin this transaction:

- Select **IRIS Reporting → Workflow → ZSUBS – Workflow Substitutes Report** to go to the *Workflow Substitutes Report* screen.

Transaction Code

ZSUBS

Helpful Hints



Substitutes can NOT be set up to review or approve for a specific funds center. Substitutes can only be set up to act on behalf of a primary agent (approver or reviewer).

Substitutes in IRIS are considered to be personal substitutes because they act on behalf of a primary agent (approver or reviewer). When a user is set up as someone's substitute, the substitute can see all work items in the primary agent's inbox, not just items for a particular area of the university.

There are two types of substitutes – permanent and as-needed:

- **Permanent Substitute** – A permanent substitute can act on the primary agent's work items without taking any special action to gain access to the work items. The substitute always receives the same items that are in the agent's inbox as soon as the primary agent receives them. When either the agent or the substitute executes an item, it is removed from both inboxes.
- **As-Needed Substitutes** – An as-needed substitute must “adopt” the substitution to see the items in the agent's inbox. The substitute adopts the substitution by clicking **Settings >> Workflow Settings >> Adopt Substitution** within transaction **SBWP – SAP Business Workplace**. When the substitution is adopted by the substitute, all the work items in the agent's inbox appear in the substitute's inbox as well. If a substitute wants to remove the primary agent's items and return to his/her own inbox, the substitute must “end” the substitution.

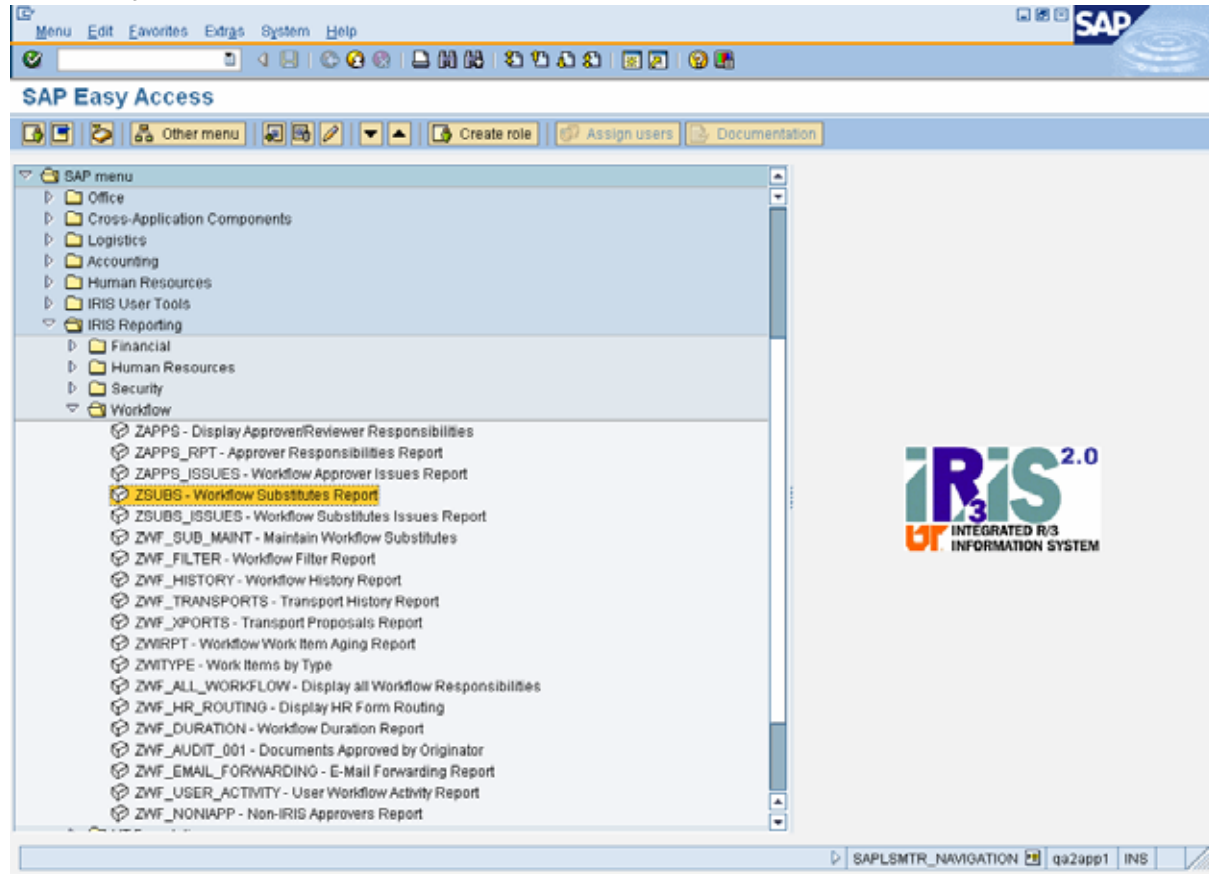


See the “SBWP – Adopt Substitution” lesson for step-by-step instructions on how a substitute adopts the work items from a primary agent's inbox.

Procedure

1. Start the transaction using the menu path or transaction code.

SAP Easy Access



2. Double-click **ZSUBS - Workflow Substitutes Report**. The *Workflow Substitutes Report* screen will appear as shown below.

Workflow Substitutes Report

3. Perform one of the following:

If you wish to see	Go To
All of the substitutes for a given agent	Step 4
All of the agents for a given substitute	Step 5


4. This step will demonstrate how to produce a listing of all substitutes for an agent.

4.1 Complete the following field:

Field Name	R/O/C	Description
Principal ID	R	IRIS user ID for the person assigned to receive workflow items. Example: MICKEY

The completed selection screen shown below will select all substitutes for user MICKEY.

Workflow Substitutes Report

4.2 Click  (**Execute**) to run the report. The *Workflow Substitutes Report* results screen will be displayed as shown below.

Workflow Substitutes Report



The screenshot shows the SAP Workflow Substitutes Report interface. At the top, there is a menu bar with 'List', 'Edit', 'Goto', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area displays the report title 'Workflow Substitutes Report' and a header section with the following information:

Report: ZWF_SUBSTITUTE_RPT	The University of Tennessee	Page: 1
User: SHCNEIL	Workflow Substitutes	Date: 06/11/2008
Sys/Cint: QA2/300	Detail Report	Time: 17:30:45

Below the header is a table with the following columns: Principal ID, Principal Name, Substitute ID, Substitute Name, Begin Date, End Date, and Permanent. The table contains two entries:

Principal ID	Principal Name	Substitute ID	Substitute Name	Begin Date	End Date	Permanent
MICKEY	Mickey Mouse	BBUNNY	Bugs Bunny	06/10/2008	12/31/9999	X
MICKEY	Mickey Mouse	EFUDD	Elmer Fudd	06/10/2008	09/30/2008	

Below the table, it says '2 entries found'. At the bottom of the screenshot, there is a status bar with 'SAPMS5Y0', 'qa2app1', and 'INS'.

The results show that user MICKEY has two substitutes:

- BBUNNY – Bugs Bunny – is a permanent substitute for MICKEY as indicated by the “X” in the *Permanent* column. BBUNNY will automatically receive work items from MICKEY’s inbox.
- EFUDD – Elmer Fudd – is not marked as a permanent substitute; so EFUDD is an “as-needed” substitute. EFUDD must “adopt” the substitution before he will see any of the work items from MICKEY’s inbox.



To adopt a substitution, the substitute must click **Settings >> Workflow Settings >> Adopt Substitution** within transaction **SBWP – SAP Business Workplace**.



See the “SBWP – Adopt Substitution” lesson for step-by-step instructions on how a substitute adopts the work items from a primary agent’s inbox.

4.3

Click  (**Back**) to return to the *Workflow Substitutes Report* selection screen.

Workflow Substitutes Report

5. This step will demonstrate how to produce a listing of all primary agents for a specified substitute.

5.1 As required, complete/review the following fields:

Field Name	R/O/C	Description
Substitute ID	R	IRIS user ID for the person designated to receive workflow items on behalf of a primary workflow agent. A substitute can be permanent or "as-needed". Example: EFUDD


The completed selection screen shown below will select all agents for whom user EFUDD is a substitute.

Workflow Substitutes Report

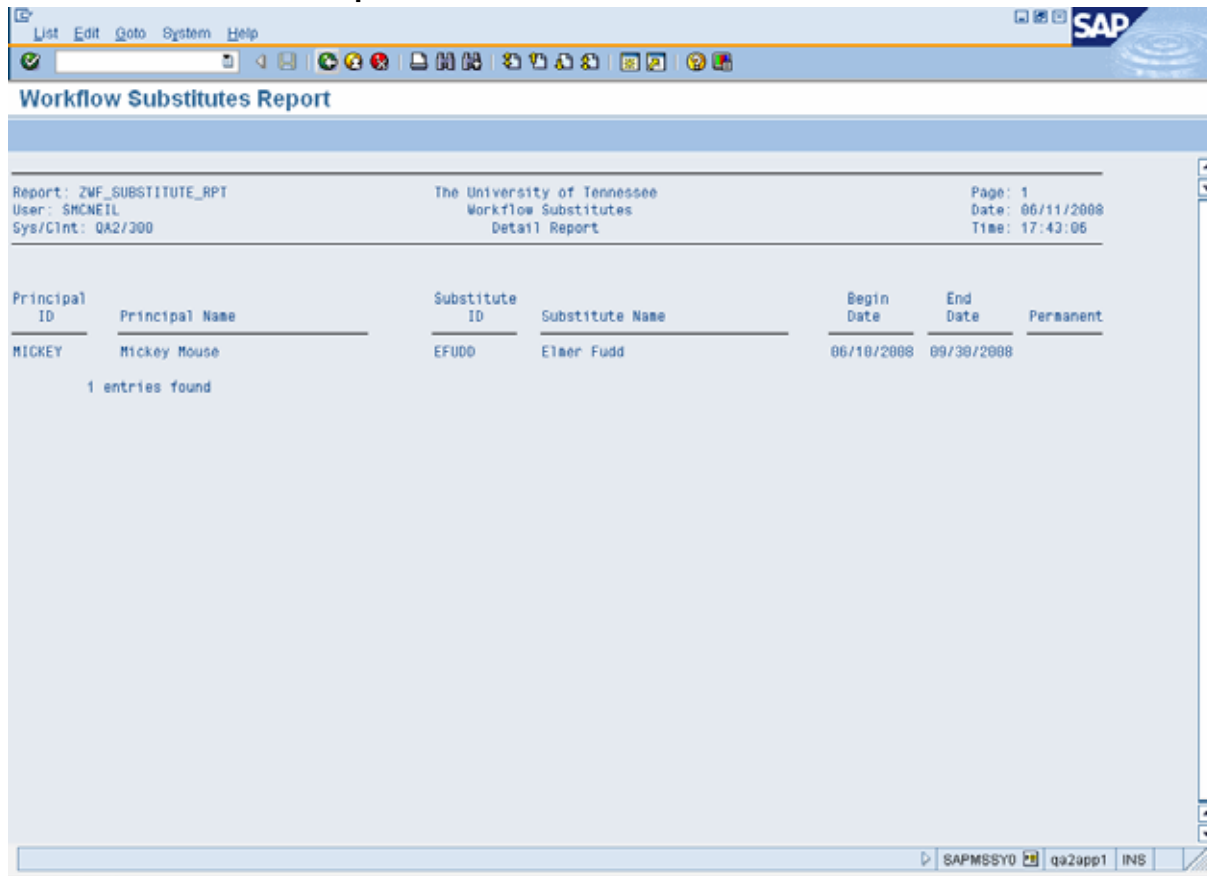
The screenshot shows the SAP 'Workflow Substitutes Report' selection screen. The title bar includes 'Program Edit Goto System Help' and the SAP logo. The main area is titled 'Workflow Substitutes Report' and contains a 'Parameters' section with the following fields:

Principal ID	<input type="text"/>	to	<input type="text"/>	
Substitute ID	EFUDD	to	<input type="text"/>	
As of Date	<input type="text"/>			

The status bar at the bottom right shows 'ZWF_SUBSTITUTE_RPT', 'qa2app1', and 'INS'.

- 5.2** Click  (**Execute**) to run the report. The *Workflow Substitutes Report* results screen will be displayed as shown below.

Workflow Substitutes Report



The screenshot shows the SAP Workflow Substitutes Report interface. At the top, there is a menu bar with 'List', 'Edit', 'Goto', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area displays the report title 'Workflow Substitutes Report' and a header section with the following information:

Report: ZWF_SUBSTITUTE_RPT	The University of Tennessee	Page: 1
User: SHCNEIL	Workflow Substitutes	Date: 06/11/2008
Sys/Cint: QA2/300	Detail Report	Time: 17:43:06

Below the header is a table with the following columns: Principal ID, Principal Name, Substitute ID, Substitute Name, Begin Date, End Date, and Permanent. The table contains one entry:

Principal ID	Principal Name	Substitute ID	Substitute Name	Begin Date	End Date	Permanent
MICKEY	Mickey Mouse	EFUDD	Elmer Fudd	06/10/2008	09/30/2008	


Below the table, it says '1 entries found'. At the bottom of the screenshot, the status bar shows 'SAPMS5Y0 qa2app1 INS'.

The results show that user EFUDD is a substitute for only one agent – user MICKEY. Since the *Permanent* field does not contain an “X”, EFUDD is an “as-needed” substitute.



It is possible for a substitute to be a permanent substitute for one agent and an as-needed substitute for another agent. If that is the case, the substitute would automatically see work items of the agent for whom he/she is a permanent substitute but would have to adopt the substitution for the other agent.

5.3 Click  (**Back**) to return to the *Workflow Substitutes Report* selection screen.

6. Click  (**Back**) to return to the *SAP Easy Access* screen.

7. You have completed this transaction.

Result

You have produced a list of substitutes for a specific agent and/or a list of agents for a specific substitute. You should also be able to determine if a substitute is a permanent or an as-needed substitute for a particular agent.

Comments



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