



FastFacts Feature Presentation

November 18, 2008



We are using audio during this session, so please dial in to our conference line...

- Phone number: 888-422-7124
- Participant code: 182500



Today's Topic

- We'll be taking a look at...

How to Maintain SAP Workflow Substitute Approvers



Today's Presenter

- Sadhya Sabatino
SAP Trainer for the Johns Hopkins Health System





Session Segments

- Presentation
 - Sadhya will show you how to update and maintain substitute approvers: for planned and unplanned times away from your SAP Inbox/es.
 - During Sadhya's presentation, your phone will be muted.
- Q&A
 - After the presentation, we'll hold a Q&A session.
 - We'll open up the phone lines, and you'll be able to ask questions.
 - Sadhya will answer as many of your questions as time allows.



Contact Us

- If you would like to submit a question during the presentation or if you're having technical difficulties, you can email us at:
fastfacts@jhu.edu
- You can also send us an instant message!
 - GoogleTalk – HopkinsFastFacts@gmail.com
 - AOL Instant Messenger – HopkinsFastFacts
 - MSN – FastFacts@jhu.edu



Survey

- Survey
 - At the end of this FastFacts session, we'll ask you to complete a short survey.
 - Your honest comments will help us to enhance and improve future FastFacts sessions.



How to Maintain Substitute Approvers



Agenda

Today, we will talk about:

- Multiple Workflow Rules/Paths (*Driving the Items Which Route to Your Inbox/es*)
- Backup for Approvers (*Vacation, Workload, and the Unexpected!*)
- R/3 Inbox Substitutes (*Active and Passive*)
- Shopping Cart Substitutes (*Active and Passive*)
- Managing Workflow as a Substitute (*When You are the Substitute for Another Approver*)
- Roles and Security (*Checking Roles and Security, and Requesting Updates if Needed for Selected Substitutes*)
- Communication Makes it Work



Multiple Workflow Rules/Paths

- Workflow 'rules' route transactions to SAP Approvers based on multiple factors, including Cost Assignment, Initiator, Org Unit, etc.
 - Shopping Cart: Cost Center or Responsible Cost Center of IO (Internal Order) charged (or WBSE for Projects). Additional routing may happen based on document type and amounts.
 - Online Payments (Check Requests): Home Cost Center of the Initiator (person who enters the Online Payment).
 - Travel and Business Expense Reimbursement: Cost Center, IO, or Responsible Cost Center of the IO charged (or WBSE for Projects).
 - ISRs: Selected by Initiator, and can only be processed by Approver with access to the Org Unit of the employee/position for whom change is requested.
 - Eforms: Based on the Home Cost Center of Initiator.
- Some workflow items may route to a group of possible Approvers, enabling them to approve/reject on behalf of each other.
- Other items may route to only one Approver, making a formal Substitute a good idea.



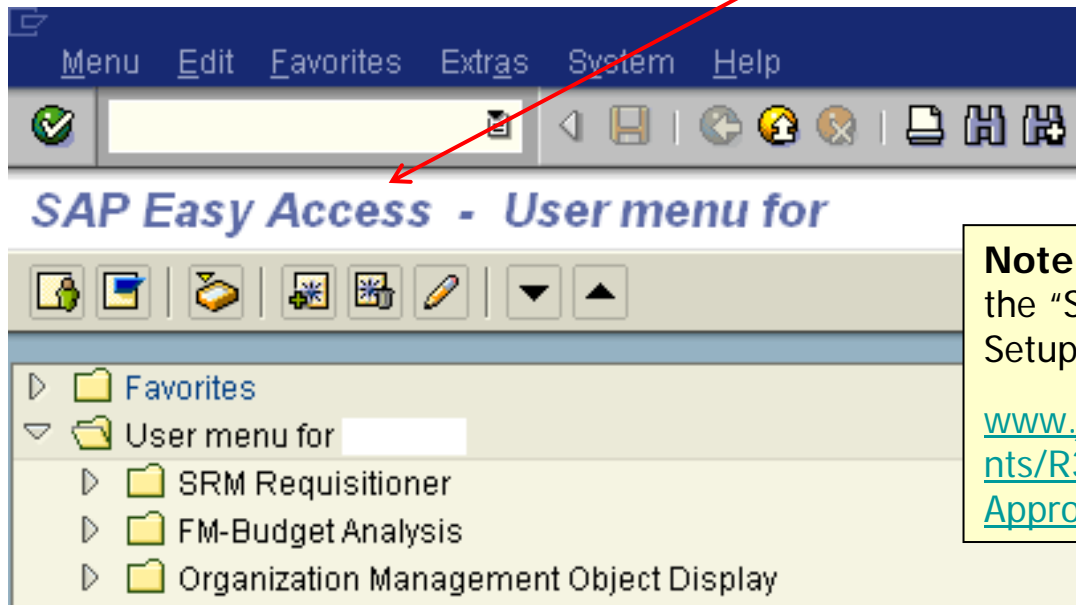
Backup for Approvers

- Workflow Substitutes in R/3 and/or Shopping Cart provide backup for Approvers who may not always be in a position to approve their work items, for example during planned and unplanned absences, meetings, and increased responsibilities...
- Two types of Substitutes:
 - **Active:** The Active Substitute receives the assigning Approver's workflow items automatically, and mixed with his/her own workflow items.
 - **Passive:** The Passive Substitute does not see the assigning Approver's workflow items until 'adopting substitution' in R/3, or 'transferring substitution' in Shopping Cart Approval.
- An assigning Approver establishes and maintains these Substitutes within the R/3 Inbox (SAP Business Workplace) and/or Shopping Cart Approval portal tab.
- It is a good business practice for all Approvers to have trusted, informed and trained Substitutes to support their approval responsibilities, particularly in preparation for unplanned absences.
- Substitute Approvers can only view/process items for which they have the specific approval role, and security (HR transactions).
- An Approver can assign multiple Active and Passive Substitutes.



Setting Up R/3 Inbox Substitutes

- To set up a Substitute Approver for your R/3 work items:
 - Log onto SAP.
 - Click the R/3 Enterprise tab.
 - Click the WinGUI 800 link to bring up the SAP Easy Access User Menu. *(Click through download messages, and relick through these steps if necessary.)*

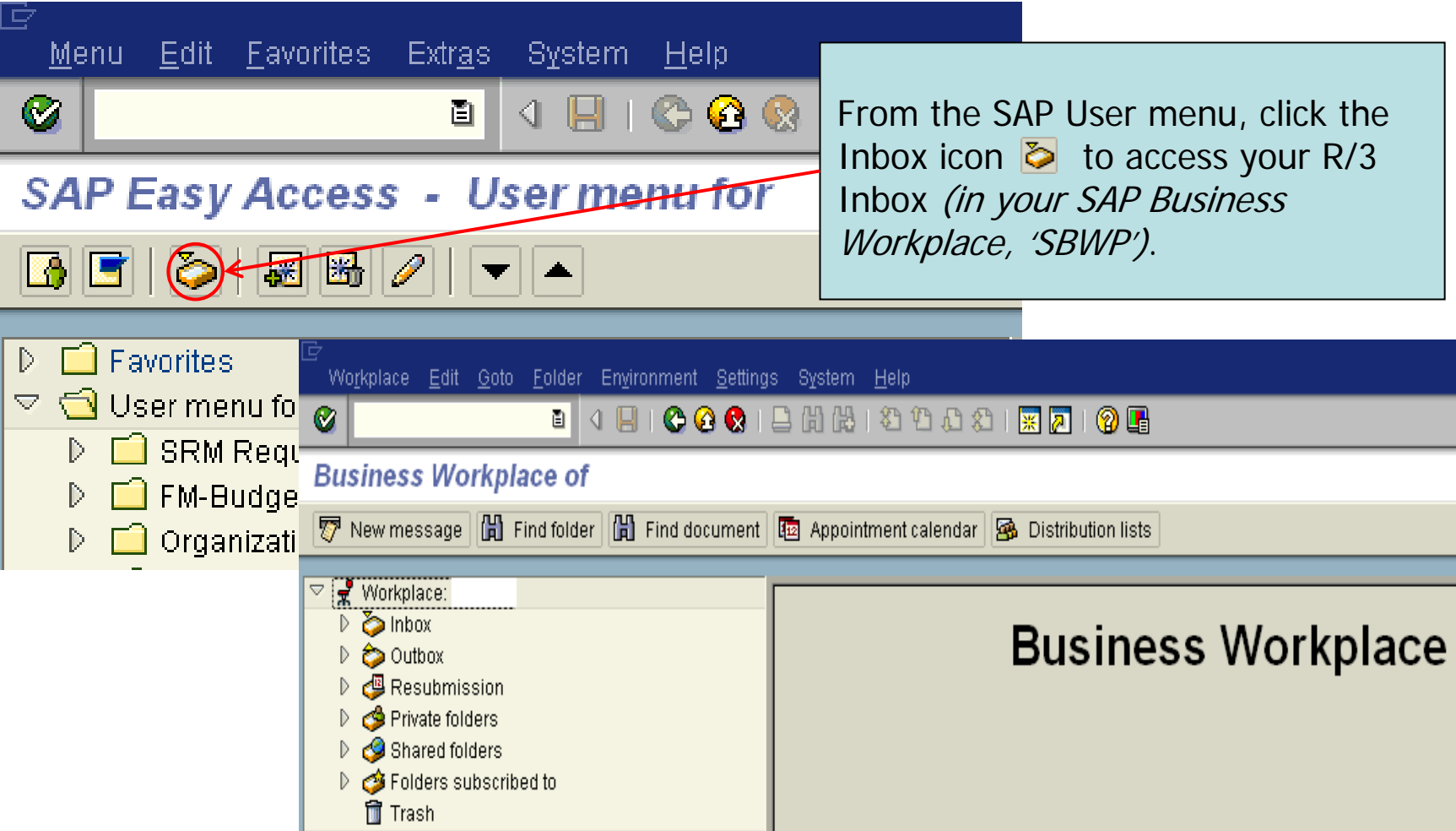


Note: This information is adapted from the "SAP R/3 Active/Passive Approver Setup Guide."


www.jhu.edu/hopkinsone/Support/documents/R3workflow_SAP_R_3_Active_Passive_Approver_Setup.ppt



Setting Up R/3 Inbox Substitutes

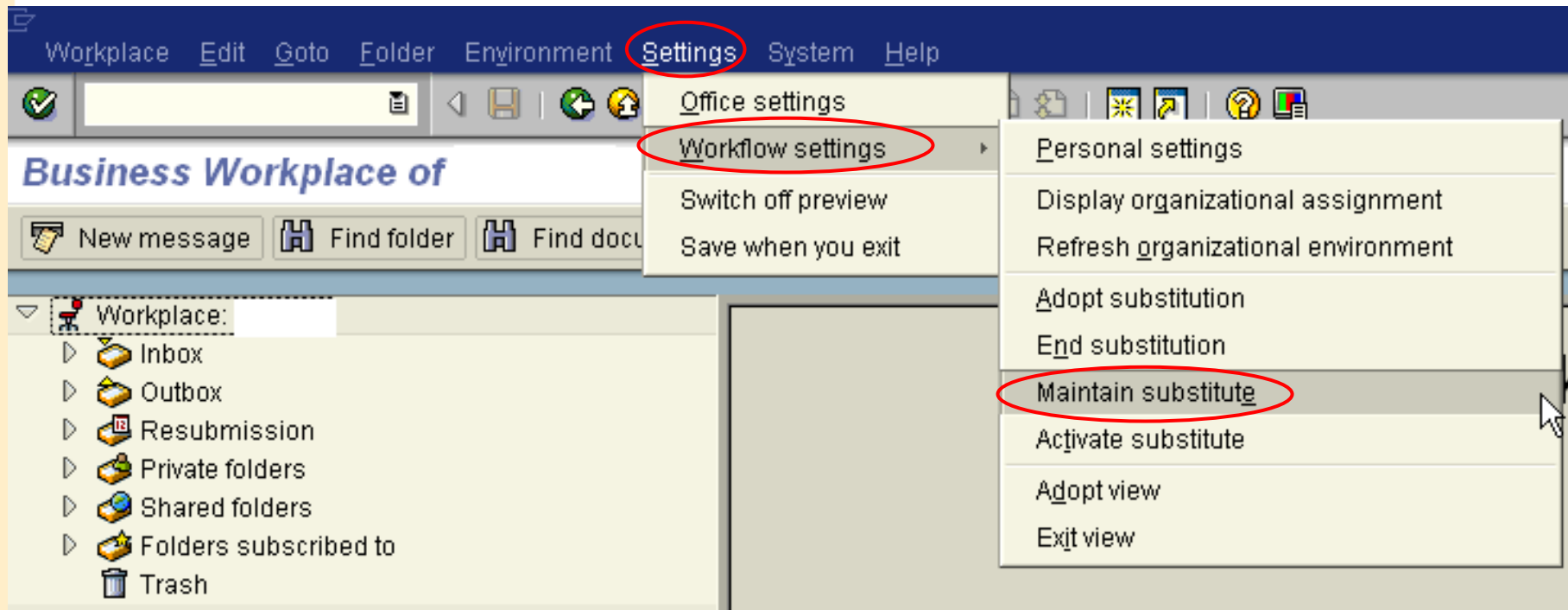


The screenshot shows the SAP Easy Access interface. The top menu bar includes "Menu", "Edit", "Favorites", "Extras", "System", and "Help". Below the menu bar is a toolbar with various icons. A red circle highlights the "Inbox" icon (a yellow envelope) in the toolbar. A red arrow points from this icon to a text box on the right. The main area of the screen displays "Business Workplace of" and a list of folders under "Workplace:". The folders listed are: Inbox, Outbox, Resubmission, Private folders, Shared folders, Folders subscribed to, and Trash. The "Inbox" folder is highlighted. The text "Business Workplace" is displayed in large font on the right side of the screen.

From the SAP User menu, click the Inbox icon  to access your R/3 Inbox (in your SAP Business Workplace, 'SBWP').



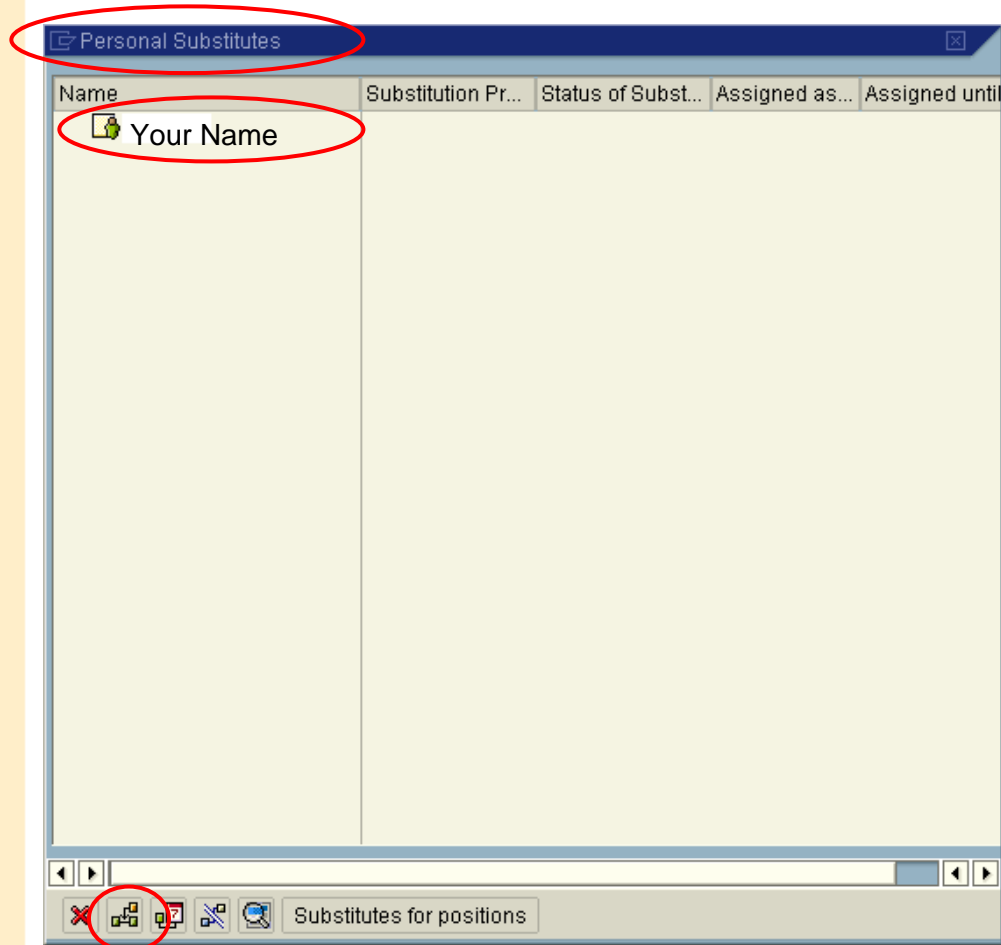
Setting Up R/3 Inbox Substitutes



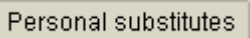
- Click **Settings**.
- Click **Workflow settings**.
- Click **Maintain substitute**.




Setting Up R/3 Inbox Substitutes



A pop-up window will open.

It should say 'Personal Substitutes' at the top of this window. If it does not, click the Personal Substitutes button which will show at the bottom of the screen. 

Your name will be listed as the agent for your workplace.

- Click to select your name.
- Then click the **Create Substitute** button. 




Setting Up R/3 Inbox Substitutes

The screenshot shows two windows of the SAP User (1) search interface. The left window shows the 'Users by address data' tab selected, with a search term field containing an asterisk (*). The right window shows the search results for the last name 'long*'. The 'Last name' field is highlighted with a red oval, and the search button (a green checkmark icon) is also highlighted with a red oval.

| Search Term | Users by address data |
|---------------------|-----------------------|
| User | |
| Last name | long* |
| First name | |
| Department | |
| Building code | |
| Room Number | |
| Extension | |
| Cost center | |
| Internal mail | |
| Company name | |
| City | |
| Maximum No. of Hits | |

Search for the name of the person that you want to establish as a Substitute.

Note: Your search results will NOT be limited to individuals with appropriate approver access. You'll need to make sure that the Substitute that you select has the proper access.

- Click **Users by address data** tab.
- Enter all or part of the person's last name followed by the wildcard (*).
- Click  to start search.



Setting Up R/3 Inbox Substitutes

User (1) 54 Entries found

Search Term: Users by address data

| User Name | Last name | First name | Departme... | Buildings | Room No. |
|-------------|-----------|-------------|-------------|-----------|----------|
| BLONG2 | LONG | BILLY | | | |
| CE01CLONG15 | LONG | CHRISTINE | | | |
| CE01CLONG3 | LONG | CAROL | | | |
| CE01DLONG6 | LONG | DOMINIQUE | | | |
| CE01TLONG7 | LONG | TULLEY | | | |
| CLONG15 | LONG | CHRISTINA | | | |
| CLONG16 | LONG | CHRISTOPHER | | | |
| CLONG19 | LONG | CHRISTINA | | | |

- The User Name field displays the person's JHED ID or CEO# + JHED ID SAP User ID.
- Double-click the employee that you want to select as a Substitute. If the person has more than one SAP User ID, you'll need to do a little digging to make sure you select the current ID which includes that person's approval roles.
(Concurrent employment causes multiple IDs for differing positions.)



Setting Up R/3 Inbox Substitutes

Your name will be displayed in the **Substitute for** field.

The name of the employee that you selected will be displayed in the **Substitute** field.

The **Validity** will default to the current system date to 12/31/9999 (unlimited).

To make the substitute an ACTIVE Substitute, click the **Substitution active** checkbox. Leave it unchecked to make assign the person as a Passive Substitute.

Click  to save.

Detail Screen Substitution

Substitute for

Substitute



Personal substitution

Substitution data

Validity 05/22/2007 to 12/31/9999

Profile General substitution

Substitution active






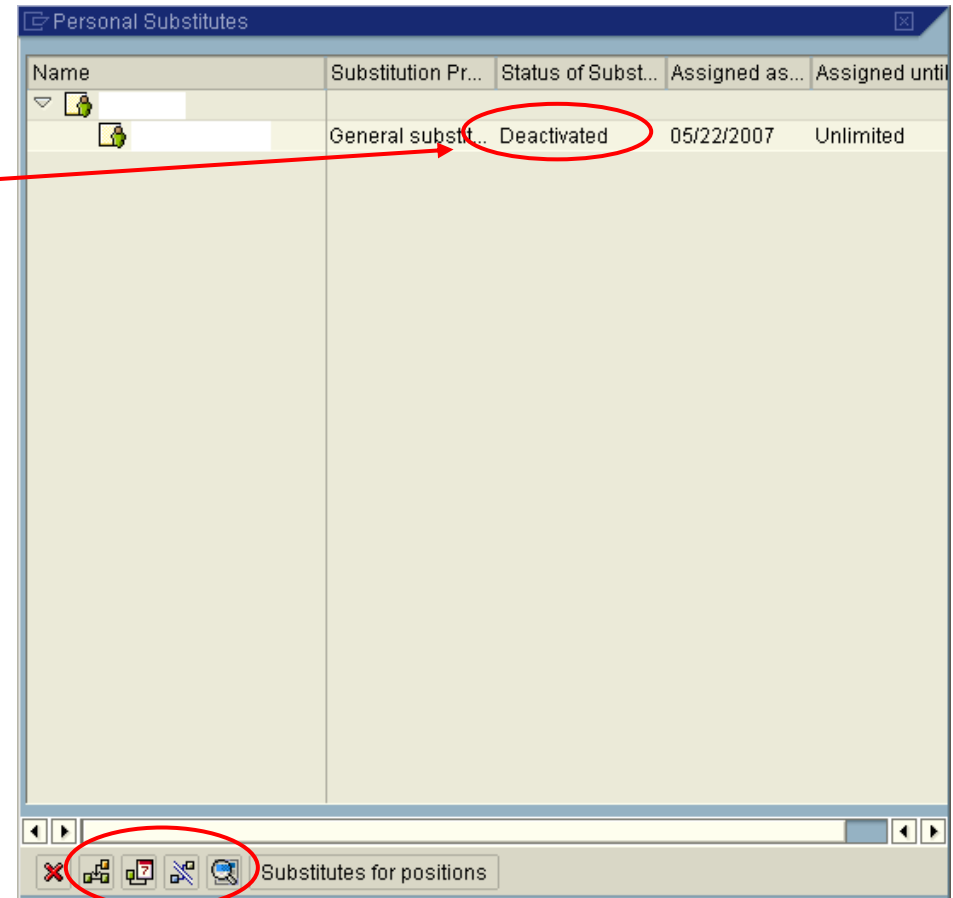
Setting Up R/3 Inbox Substitutes

Once you save, you will see the Substitute's name displayed in the Personal Substitutes window with a status of 'Activated' or 'Deactivated.'

- Activated – Workflow is automatically forwarded to the Substitute's inbox (Active Substitute).
- Deactivated – Substitute must access the approver's work items by adopting (Passive Substitute).

You can make changes to this information by using the buttons at the bottom of this window:

-  allows you to edit the Substitute information (i.e., set to Active).
-  allows you to change the 'assigned until' date.
-  allows you to delete a Substitute.



| Name | Substitution Pr... | Status of Subst... | Assigned as... | Assigned until |
|------|--------------------|--------------------|----------------|----------------|
| | General subst... | Deactivated | 05/22/2007 | Unlimited |

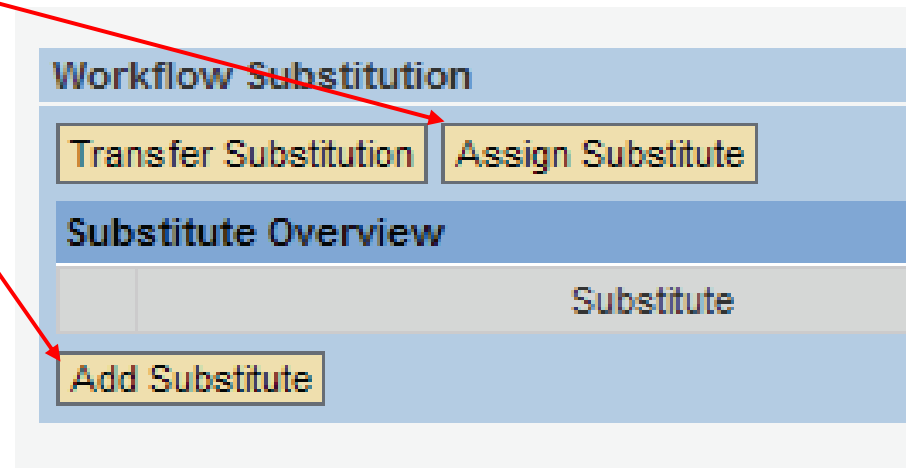
Substitutes for positions



Setting Up Shopping Cart Substitutes

To set up a Substitute Approver for Shopping Carts:

- From the Shopping Cart Approval portal tab screen, look to the far right, and click the **Substitute** button.
- Then look to the lower left to click the **Assign Substitute** button.
- Then click **Add Substitute**.
- (**Transfer Substitution** is for the Passive Approver to retrieve the assigning Approver's Shopping Cart work items.



Note: This information is adapted from the *October 2008 SAP Support Update*, "How to establish substitute approvers in SRM."

<http://orchid.hosts.jhmi.edu/hopkinsone/News/issues/october2008.pdf>



Setting Up Shopping Cart Substitutes

- Fill in the date range, select a status (Active Substitute or Passive Substitute), and enter the Substitute's SAP User ID. Then click **Add**.

Workflow Substitution

[Transfer Substitution](#) [Assign Substitute](#)

Start on - End on -

Status ▾

Substitute [Find](#)

[Add](#) [Cancel](#)

- The resulting screen shows the Substitute you've assigned.

Workflow Substitution

[Transfer Substitution](#) [Assign Substitute](#)

Substitute Overview

| | Substitute | Status |
|---|------------------|----------------|
| 1 | Roger Rosenblatt | <u>Passive</u> |

[Add Substitute](#)



Managing Workflow as a Substitute

■ Active Substitute:

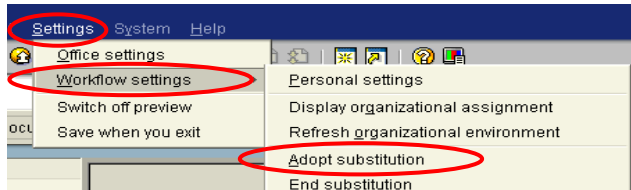
- Items pending approval by the assigning Approver will also appear in your Inbox, comingled with your Inbox work items.
- SAP will allow you to approve/reject items based on your roles and security.
- Once you click on items, your name will appear as the 'Agent' in the item's workflow display.
- This type of substitution is most often assigned for a specific timeframe.



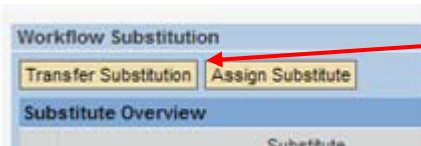
Managing Workflow as a Substitute

■ Passive Substitute:

- Can access the assigning Approver's pending Inbox items.
- From R/3 Inbox, click Settings → Workflow settings → Adopt substitution.



- From the Shopping Cart Approval tab, click **Substitute**, then 'Transfer Substitution.'



- When finished approving/rejecting assigning Approver's work items, the Passive Substitute 'ends' substitution to retrieve own work items.
- This type of substitution is most often assigned as a permanent backup for planned and unplanned absences.



SAP Roles and Security

- View approval roles:
 - To view SAP roles, including Approver roles, navigate to your SAP Easy Access Menu, click open the Enduser Role folder, and double-click 'Display Position by Role Assignment.'
- HR security for HR transactions:
 - For ISRs and Eforms, an Approver also must have Organizational Unit (Org Unit) access to the Org Unit of the employee for whom change is requested. This can be determined by the departmental HR / payroll contact through that person's SAP R/3 access.
- If approval roles or additional security are required for a substitute:
 - Health System Employees: ISR (Internal Service Request) Lite, initiated by responsible administrator, director, HR manager...
 - University Employees: ISR initiated by an ISR initiator.
 - Bayview Employees: Contact Bayview HR Information Services.
 - Community Physicians: Contact Community Physicians HR.



Communication Makes it Work

Clear and documented guidance puts the technology to work for you, and helps to avoid future headaches.



Conclusion

- Establish/maintain substitutes within your R/3 Inbox and Shopping Cart Approval portal tab.
- Check and verify SAP User ID's, and request any needed update/s of roles and security.
- As an assigning Approver, provide clear and documented guidelines to Substitutes.
- If a Substitute, request clear and documented guidelines from assigning Approvers.



Q&A

- We're going to open the phone lines now!
- There will be a slight pause, and then a recorded voice will provide instructions on how to ask questions over this conference call line.
- We'll be answering questions in the order that we receive them.
- We'll also be answering the questions that were emailed to us during the presentation.
- If there's a question that we can't answer, we'll do some research after this session, and then email the answer to all participants.



Thank You!

- Thank you for participating!
- We would love to hear from you.
 - Are there certain topics that you would like us to cover in future FastFacts sessions?
 - Would you like to be a FastFacts presenter?
 - Please email us at: fastfacts@jhu.edu



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- You can also send us an instant message!
 - GoogleTalk – HopkinsFastFacts@gmail.com
 - AOL Instant Messenger – HopkinsFastFacts
 - MSN – FastFacts@jhu.edu



Survey

- Before we close, please take the time to complete a short survey.
- Your feedback will help us as we plan future FastFacts sessions.
- Click this link to access the survey...
<http://connect.johnshopkins.edu/fastfactssurvey/>

Thanks again!



Setting Up R/3 Inbox Substitutes

Remember, if the **Substitution active** checkbox is not selected, the employee will become a Passive Substitute.

In order to retrieve pending approval items for the assigning Approver, the Passive Substitute must 'adopt substitution' (click Settings → Workflow settings → Adopt substitution).

The screenshot shows the 'Detail Screen Substitution' window. It contains the following fields and options:

- Substitute for:** [Empty text box]
- Substitute:** [Empty text box]
- Personal substitution
- Substitution data:**
 - Validity:** 05/22/2007 to 12/31/9999
 - Profile:** [Yellow highlighted box] General substitution
- Substitution active (This checkbox is circled in red in the original image, with a red arrow pointing from the text box on the left to it.)

At the bottom of the window, there are icons for 'Save' (a floppy disk) and 'Close' (an 'X').