Establishing Substitute Buy@Duke Approvers in the Universal Worklist

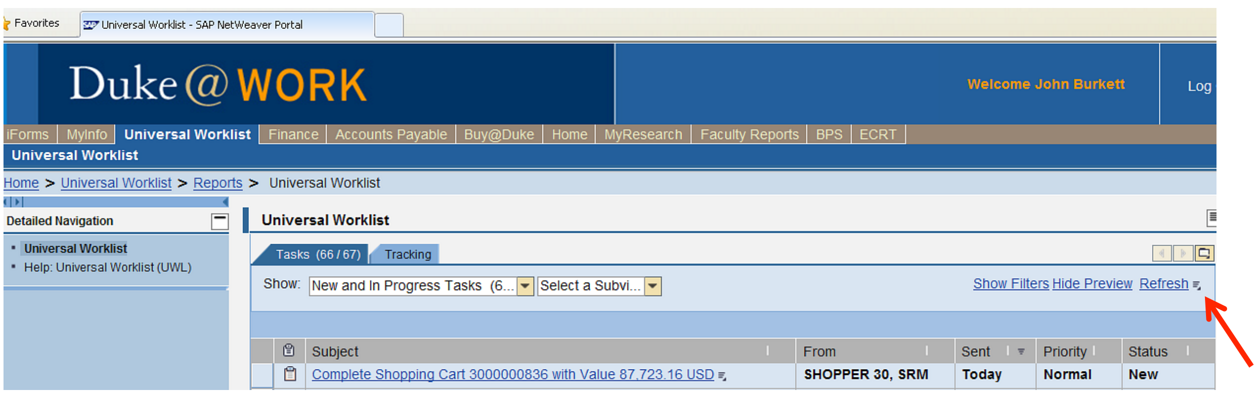
Overview

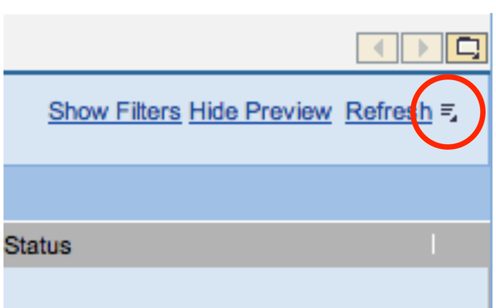
Substitute Buy@Duke approvers for fund code and high dollar shopping cart reviews can be established in the **Universal Worklist** (UWL) on the Duke@Work portal. This document provides instructions for delegating cart approval responsibilities to other SAP users at Duke.

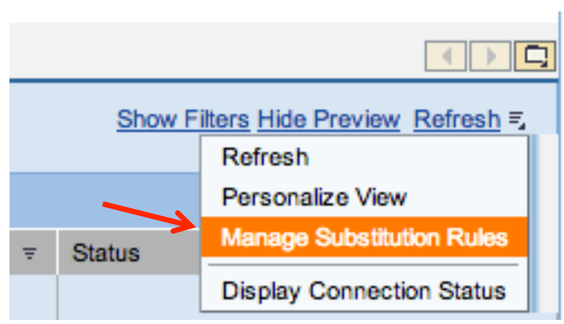
Workflow substitution

Manage substitution rules

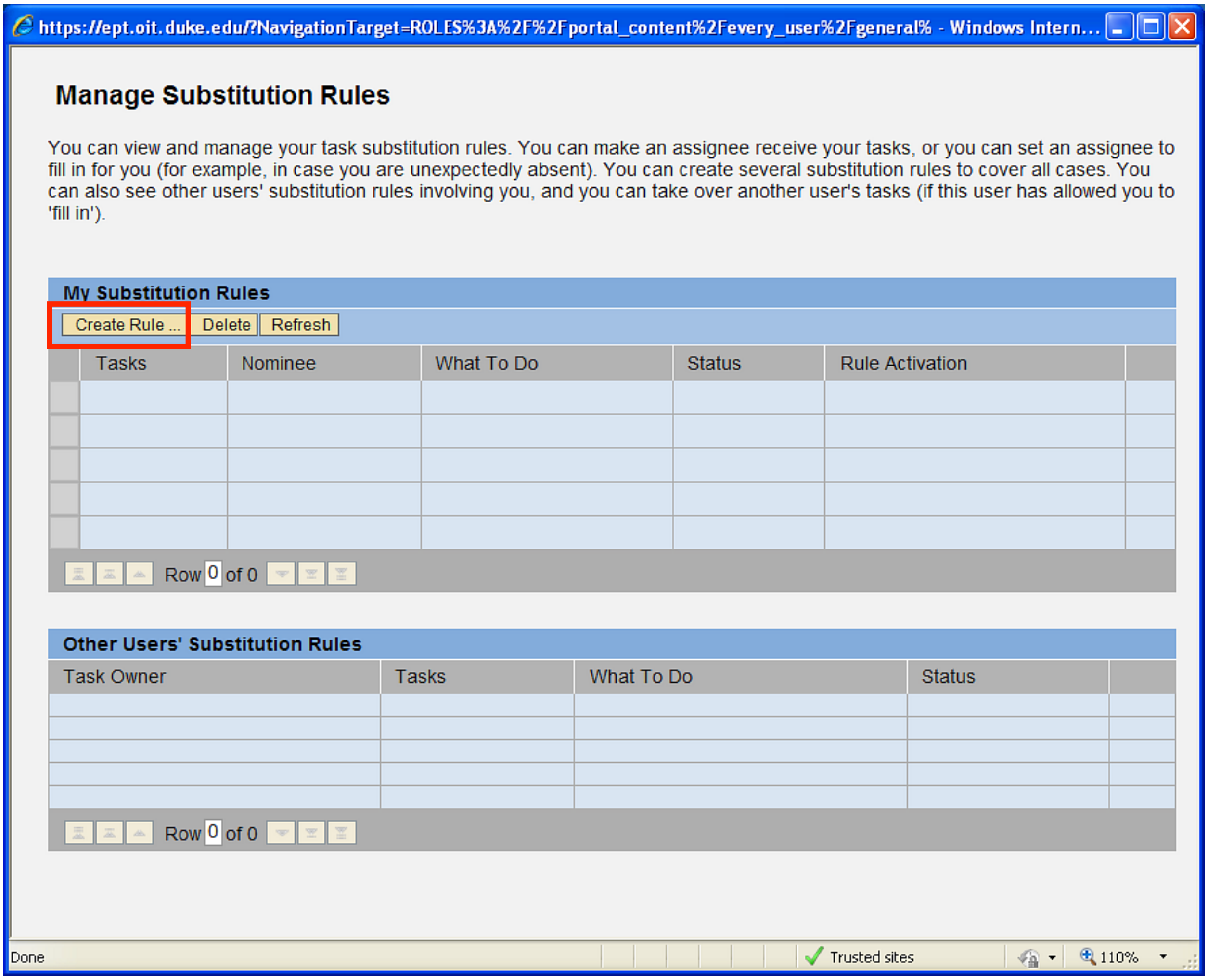
Approval workflow substitutions are managed under the settings menu on the UWL. To access this menu, click the small black icon to the right of the **Refresh** link on the UWL tab in Duke@Work. Select the **Manage Substitution Rules** entry.





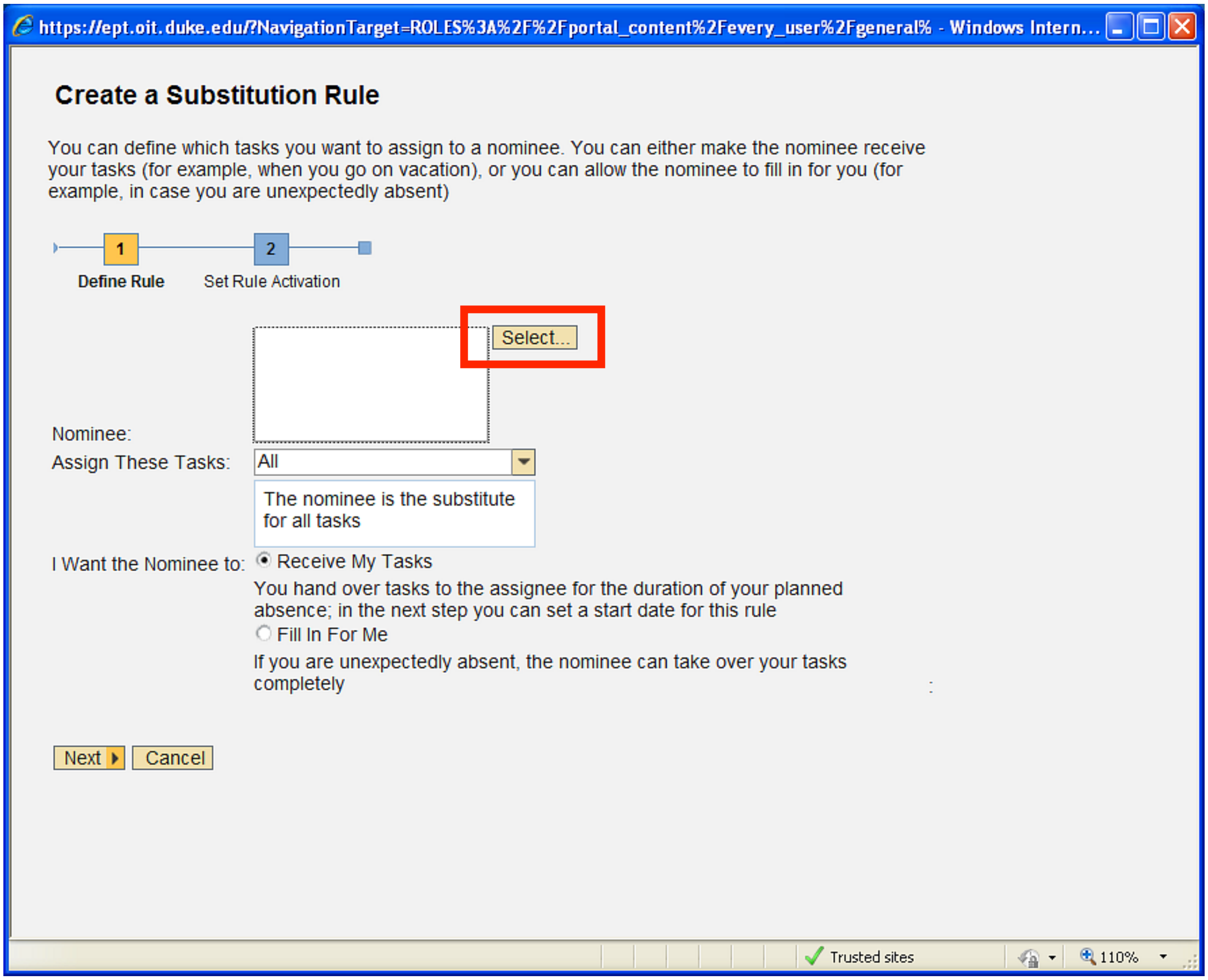


On the **Manage Substitution Rules** pop-up window, click the **Create Rule** button.

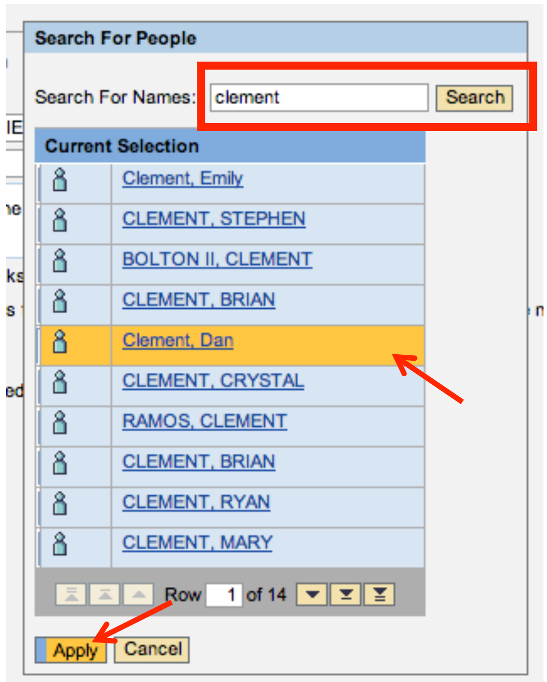


Define the rule

On the Create **a Substitution Rule** window, click the **Select** button to search for a delegate.



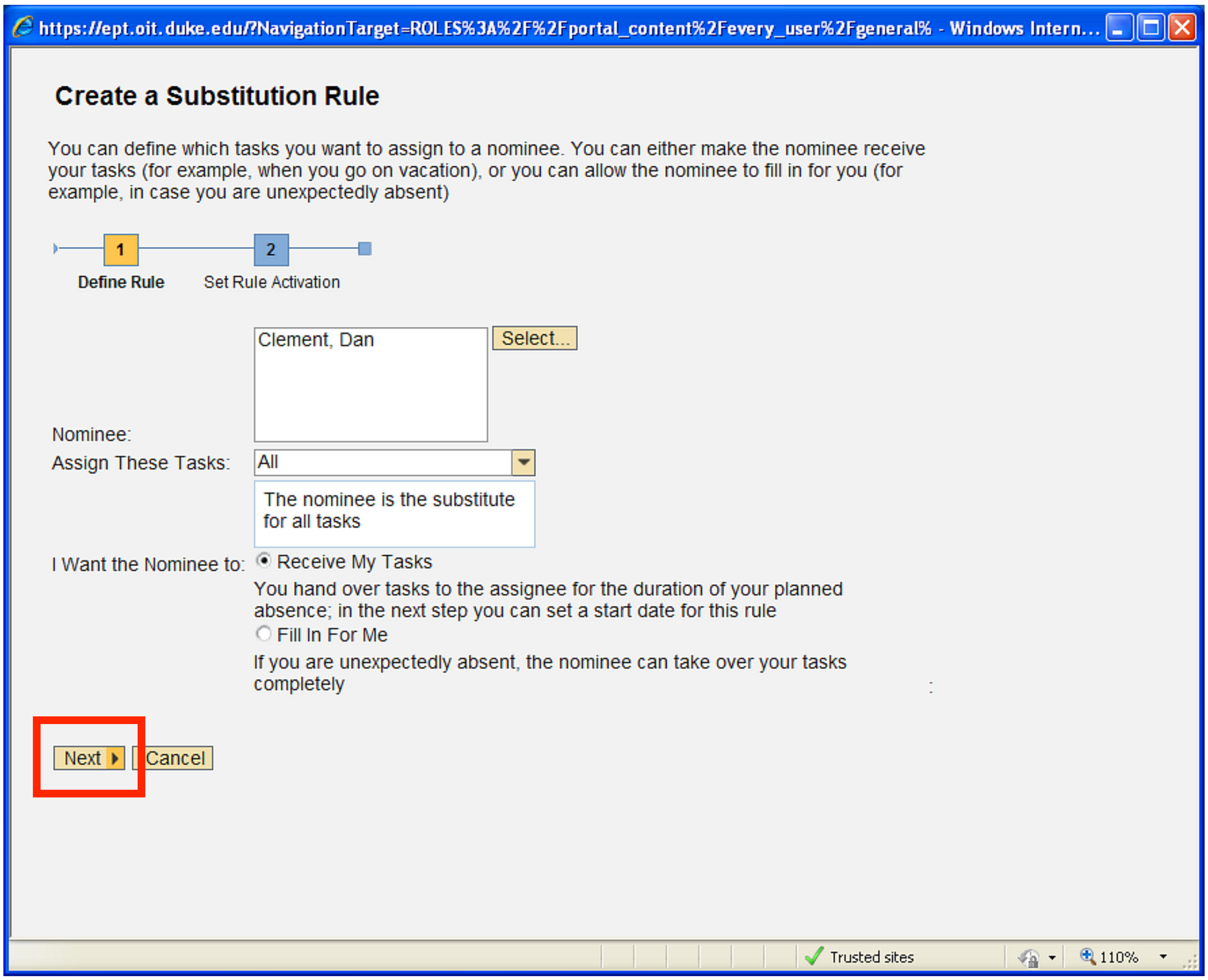
On the **Search For People** pop-up, enter the last name of the delegate and click the **Search** button. Select the name of the nominee to highlight it and then click the **Apply** button.



After the delegate **Nominee** is assigned, make sure that the **Assign These Tasks** option is set to all. Two options are available under the **I Want the Nominee to** entry:

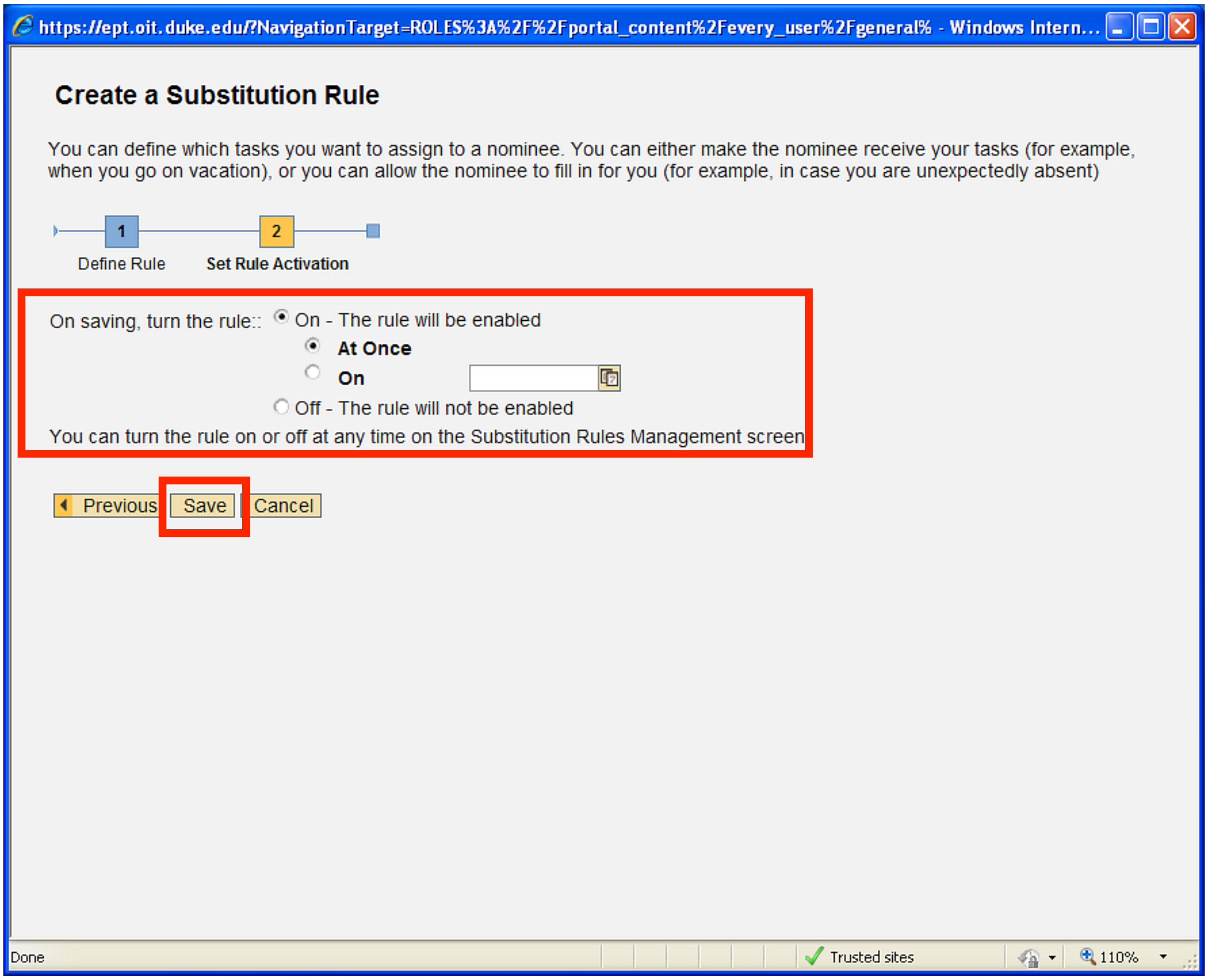
- **Receive My Tasks** (active) – Substitute will receive your carts in their workflow list without any additional action.
- **Fill in For Me** (passive) – Substitute can opt to get your carts (useful for an unexpected absence). User must take action, as described later in this document, to see and process your workflow items.

Once a selection has been made, click the **Next** button.



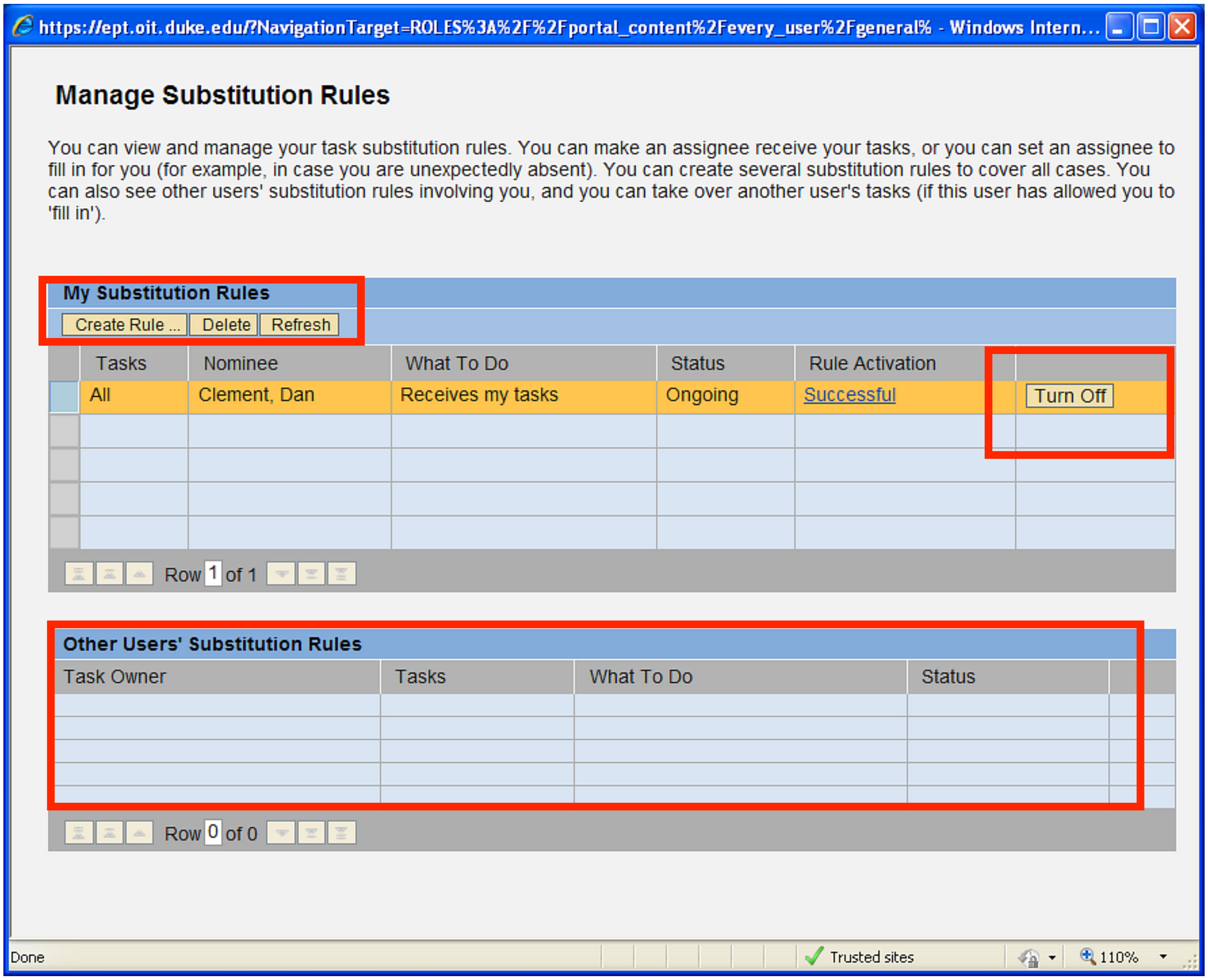
Set rule activation

On this screen, you will decide when you would like the substitution to become active. To activate the delegation immediately, select the **At Once** option. To designate a specific future date, select the **On** option and assign a date in the text box. Click the **Save** button when complete.



Disabling substitution rules

Substitutions can be made active or disabled on the **Manage Substitution Rules** window. Use the **Turn On** or **Turn Off** buttons next to the delegate's name to set the rule. To remove the delegate entirely, click the gray box to the left of the name and use the **Delete** button. If you are a substitute for someone else, their name will appear in the **Other User's Substitution Rules** box at the bottom of the screen. Exit this window by clicking the browser window's close button.



Adopting a substitution

In cases where you have been set up as an approval delegate by someone else using the **Fill In For Me** option, you can choose when to turn on or off substitution workflow. On the **Manage Substitution Rules** window, select the **Take Over** button on the **Other Users' Substitution Rules** box next to the name of the individual in which you are the substitute.