

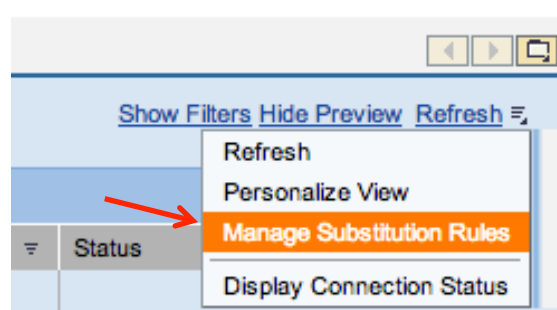
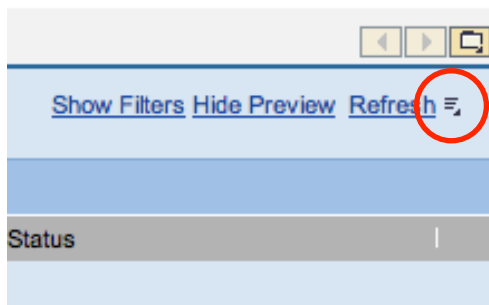
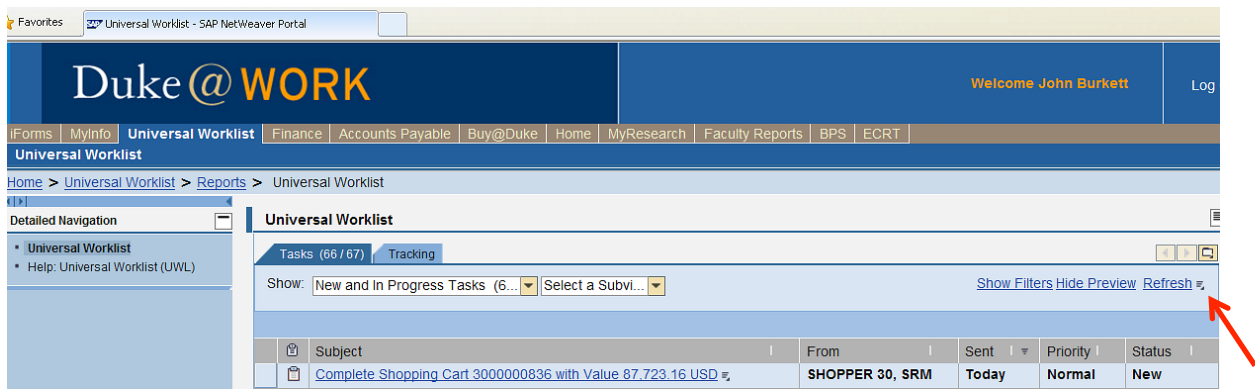
Overview

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.

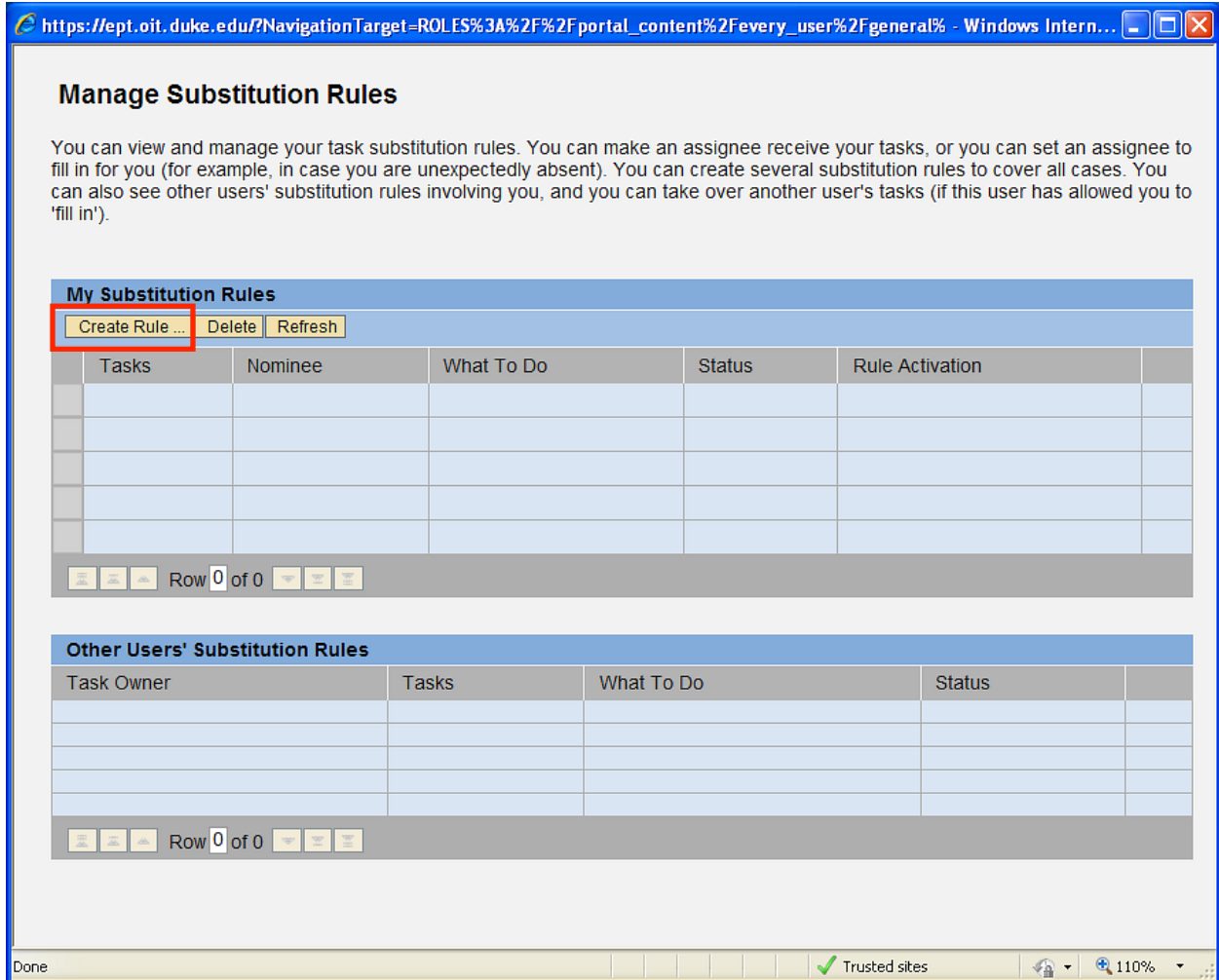
Workflow substitution

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.



https://ept.oit.duke.edu/?NavigationTarget=ROLES%3A%2Fportal_content%2Fevery_user%2Fgeneral% - Windows Intern...

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation

Row 0 of 0

Other Users' Substitution Rules

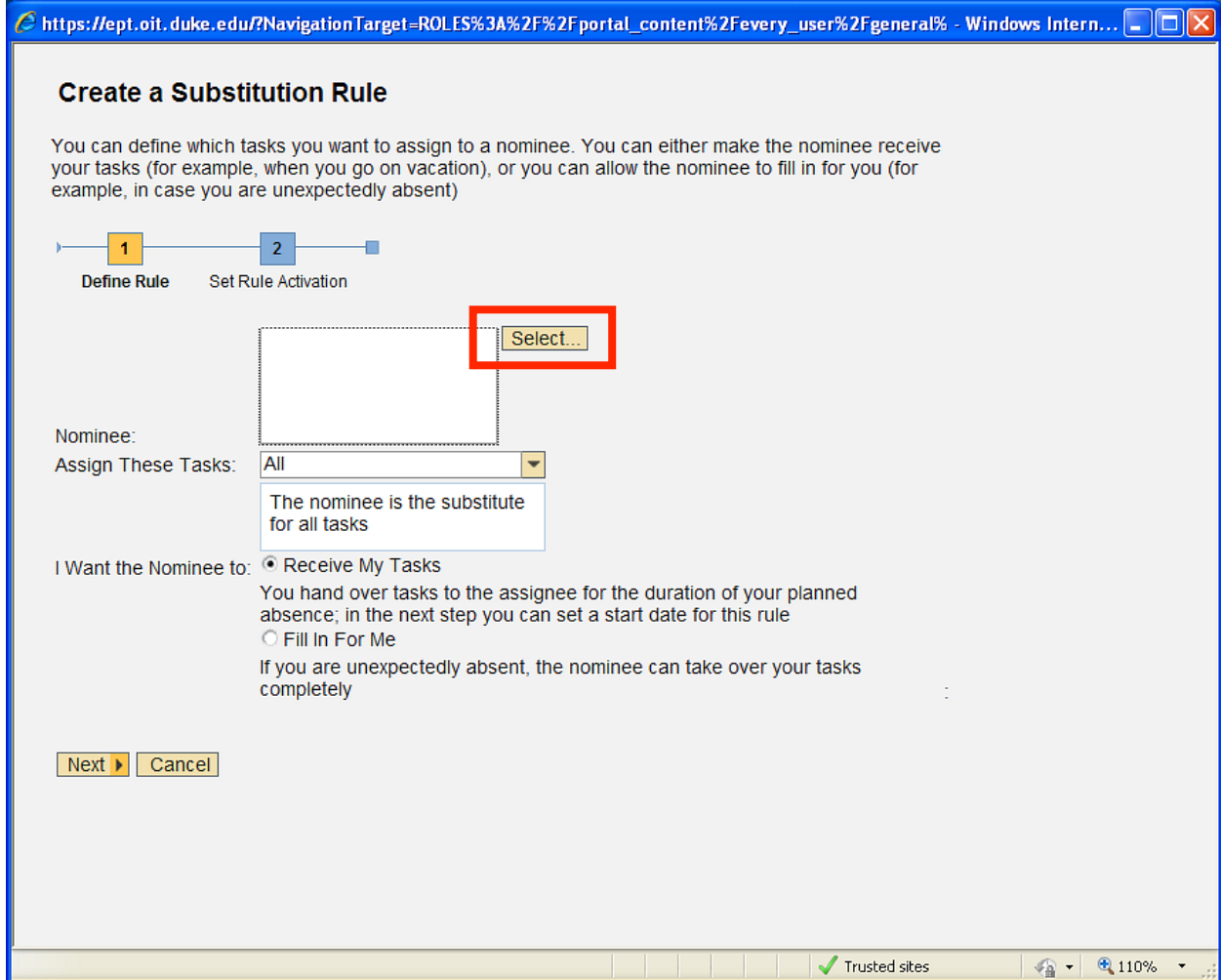
Task Owner	Tasks	What To Do	Status

Row 0 of 0

Done Trusted sites 110%

Define the rule

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



Establishing Substitute Buy@Duke Approvers in the Universal Worklist

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.

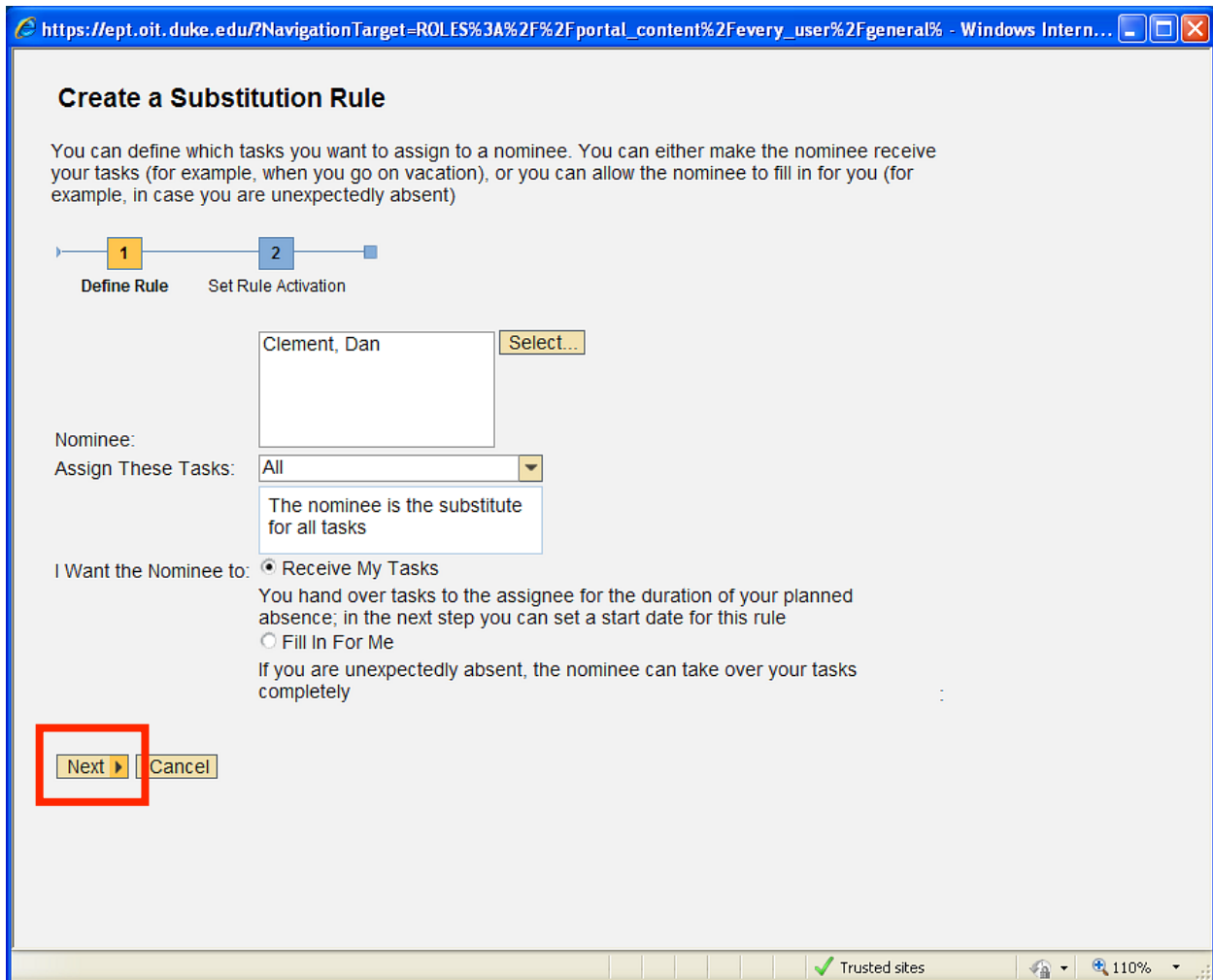
The screenshot shows a 'Search For People' dialog box. At the top, there is a search input field containing the text 'clement' and a 'Search' button to its right. Below this is a table titled 'Current Selection' with a blue header. The table contains 11 rows, each with a person icon and a name. The name 'Clement, Dan' in the fifth row is highlighted in yellow. A red arrow points from the right side of the table to this highlighted row. Below the table is a pagination control showing 'Row 1 of 14' and several navigation icons. At the bottom of the dialog are two buttons: 'Apply' and 'Cancel'. A red arrow points from the 'Apply' button to the left.

Current Selection	
	Clement, Emily
	CLEMENT, STEPHEN
	BOLTON II, CLEMENT
	CLEMENT, BRIAN
	Clement, Dan
	CLEMENT, CRYSTAL
	RAMOS, CLEMENT
	CLEMENT, BRIAN
	CLEMENT, RYAN
	CLEMENT, MARY

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.



Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)

1 Define Rule 2 Set Rule Activation

Nominee: Clement, Dan Select...

Assign These Tasks: All

The nominee is the substitute for all tasks

I Want the Nominee to: Receive My Tasks
 You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule
 Fill In For Me
 If you are unexpectedly absent, the nominee can take over your tasks completely

Next Cancel

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.

https://ept.oit.duke.edu/?NavigationTarget=ROLES%3A%2Fportal_content%2Fevery_user%2Fgeneral% - Windows Intern...

Create a Substitution Rule

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1 Define Rule 2 Set Rule Activation

On saving, turn the rule::

- On - The rule will be enabled
- At Once**
- On
- Off - The rule will not be enabled

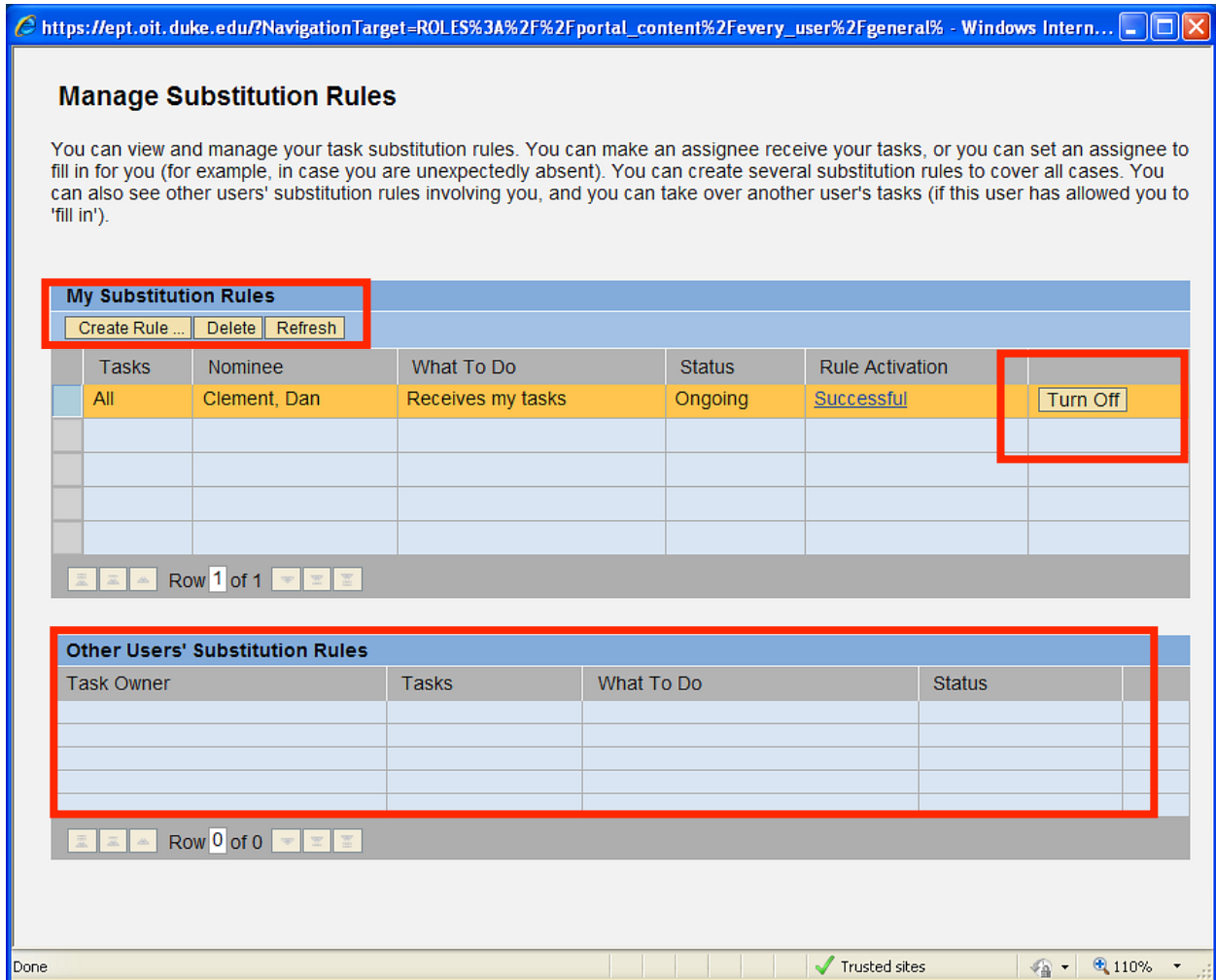
You can turn the rule on or off at any time on the Substitution Rules Management screen

Previous Save Cancel

Done Trusted sites 110%

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.



Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	
All	Clement, Dan	Receives my tasks	Ongoing	Successful	Turn Off

Row 1 of 1

Other Users' Substitution Rules

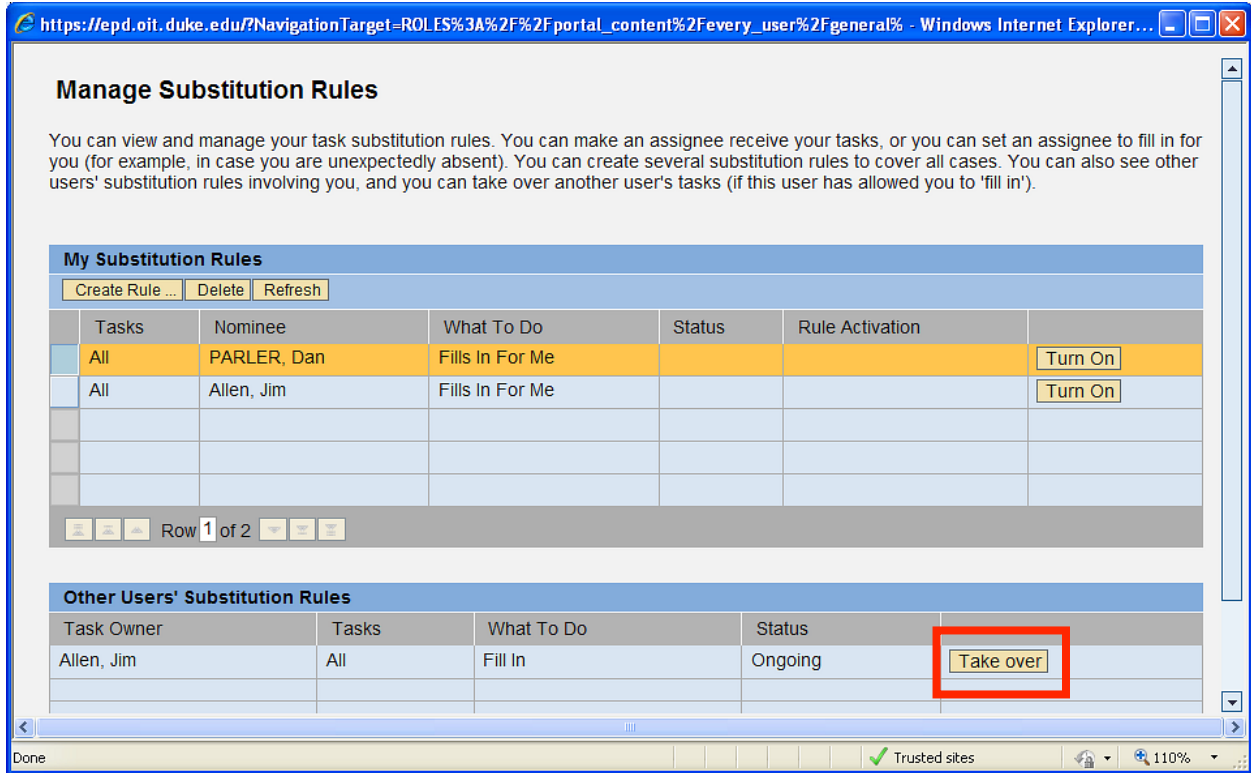
Task Owner	Tasks	What To Do	Status

Row 0 of 0

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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.



Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation
All	PARLER, Dan	Fills In For Me		Turn On
All	Allen, Jim	Fills In For Me		Turn On

Row 1 of 2

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	
Allen, Jim	All	Fill In	Ongoing	Take over