

Designating a Substitute P&F Approver [Bureau and Business Partner Approvers]

Module: OM, PA, P&F Application // Process: How to designate a substitute approver for yourself in the P&F Workflow.

The screenshot displays the SAP CityLink portal interface for The City of Portland, Oregon. The top navigation bar includes 'Employee Self-Service', 'Business Partner' (highlighted with a red box), and 'Employee Programs'. Below the navigation bar, the 'Overview' section provides an overview of the Employee Self-Service applications and lists several categories with their respective quick links:

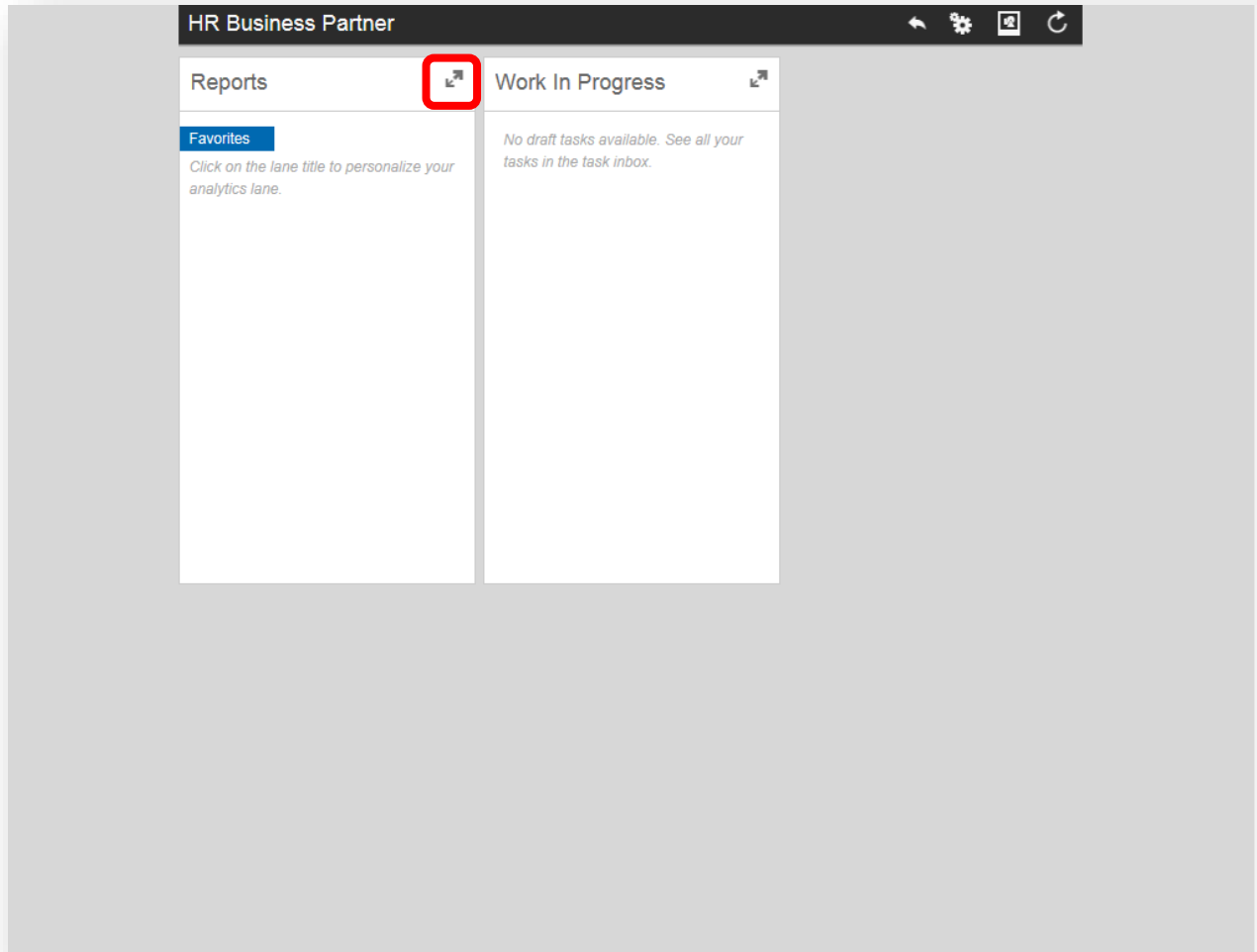
- Personal Information:** Manage your contact information. Quick Links: [My Personal Data](#), [My Address Information](#), [My Communication Information](#), [Validate Social Security Information](#).
- Time - Read Only:** View your time sheet and leave balances. Quick Links: [My Time Sheet](#), [My Time Statement](#), [Leave Balances](#).
- Compensation:** View your pay statement and change your tax withholdings. Create, view and/or change your banking details. Quick Links: [My Pay Statement](#), [My Tax Withholding \(W-4\)](#), [My Banking Information](#), [My Pay Statement Delivery Method](#).
- CityLearner:** Manage your training activities, view training history, and search the training catalog.
- Help:** View Help Documents and Frequently Asked Questions (FAQs). Quick Links: [ESS Help](#).

01 BEGIN

From the Portal main page, click on the **Business Partner** folder icon.

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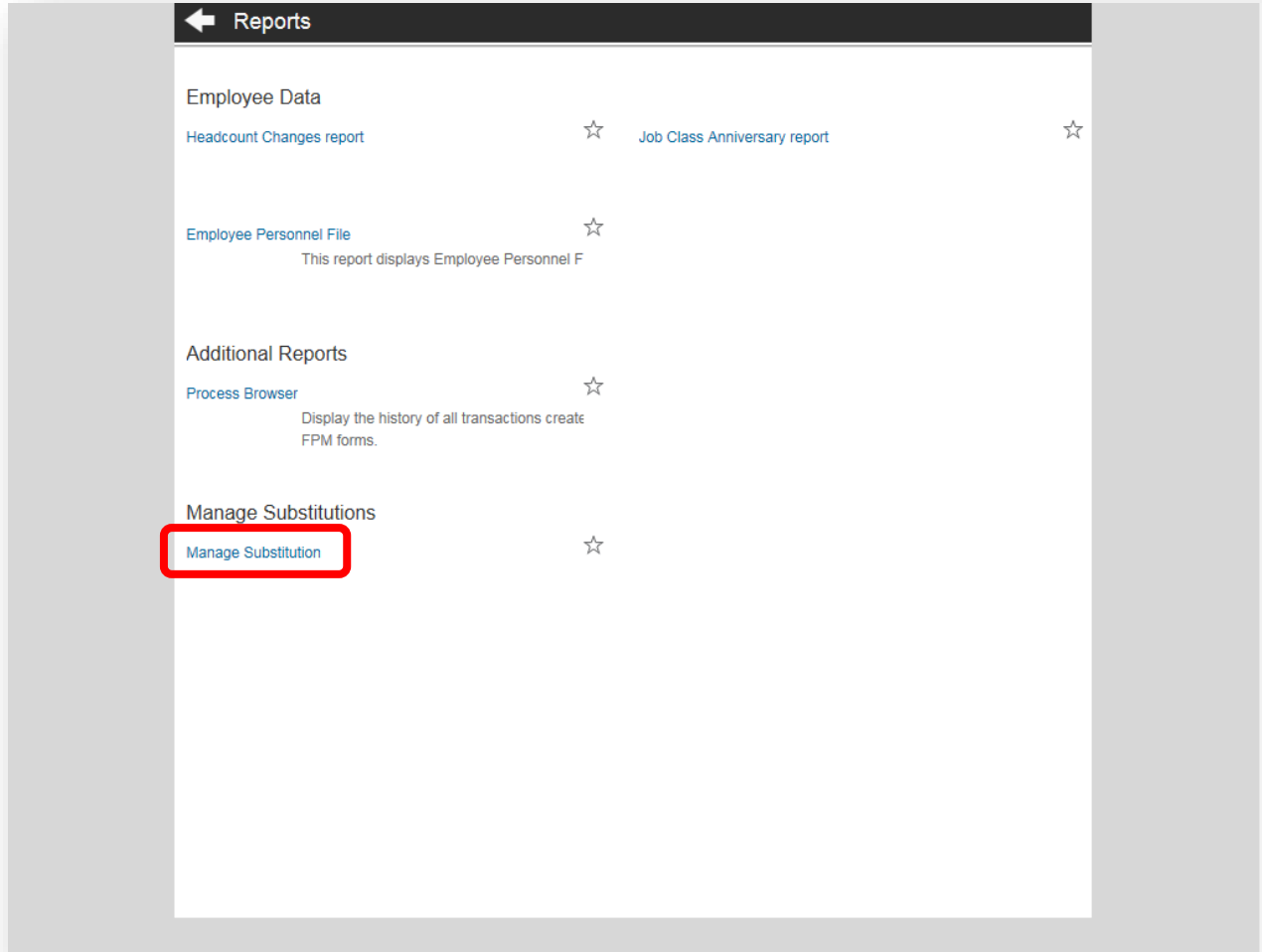


02

From your Landing Page, open your **Reports** swim lane.

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03

In the Reports full-screen swim lane, click on **Manage Substitutions**.

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Manage Substitution Rules

You can view and manage your substitution rules.
You can create several substitution rules for planned or for unexpected absences.
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	Assignee	Substitution Type	Status	Rule Activation

Other Users' Substitution Rules

Tasks	Task Owner	Substitution Type	Status	Substitution Takeover

04

Click on **Create Rule** to bring up the pop-up selector rule pane.

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The screenshot shows the 'Manage Substitution Rules' interface. At the top, there are instructions: 'You can view and manage your substitution rules. You can create several substitution rules for planned or for unexpected absences. 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').'

The main area is divided into two sections: 'My Substitution Rules' and 'Other Users' Substitution Rules'. Each section has a table with columns for 'Tasks' and 'Assignee' (or 'Task Owner').

A 'Create a Substitution Rule' dialog box is open in the foreground. It contains the following fields and options:

- * Assignee: [Text Field] **Match-Code Box** (highlighted with a red box)
- Assign These Tasks: [Dropdown]
- I Want the Assignee To:
 - Receive My Tasks
You hand over tasks to the assignee for the duration of your planned absence; you can set a start date for this rule.
 - Fill In for Me
If you are unexpectedly absent, the assignee can take over your tasks completely.
- Activation of the Rule:
 - At Once
 - On [Text Field]
 - Do not activate the rule now.
- Deactivate this rule.:
 - Never
The rule is not automatically deactivated on a specified date. You can, however, deactivate or delete it at any time.
 - On [Text Field]
The rule is automatically deactivated on the specified date. You can deactivate or delete it at any time.

Buttons: OK, Cancel

05

Click on the **Match-Code Box** to bring up the search criteria box.

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The screenshot shows the 'Manage Substitution Rules' dialog box in SAP. A 'Create a Substitution Rule' sub-dialog is open, showing the 'Assignee' field. Below it, the 'Search: Assignee' dialog is visible, with the 'Search Criteria' section. The 'User' field is highlighted with a red box, and the 'Search' button is also highlighted with a red box. The 'Search Criteria' section includes a dropdown for 'Further Search Helps' set to 'Users by Address Data', and four search criteria: 'User', 'Last name', 'First name', and 'Department', each with a dropdown menu and a search operator. The 'User' field is currently empty. The 'Search' button is highlighted with a red box. Below the search criteria, there is a checkbox for 'Maximum Number of Results' set to 500. At the bottom of the search dialog, there are buttons for 'Search', 'Clear Entries', and 'Reset to Default'. The 'Search' button is highlighted with a red box. Below the search dialog, there is a dialog box with 'OK' and 'Cancel' buttons.

06

You can search by SAP User ID, First Name, Last Name, or Department (bureau).

In this case, we will search for all available substitutes by entering the wildcard "*" (asterisk) in the **User** field.

Click **Search**.

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07

Choose a substitute.

In this case, choose **PFTESTPA20** by clicking on the line the name is in.

The screenshot shows the 'Manage Substitution Rules' interface. A search window titled 'Search: Assignee' is open, displaying search criteria and results. The search criteria include fields for User, Last name, First name, and Department, each with a dropdown menu and a search button. The search results list two users: PFTESTPA20 and PFUAT84. The first row, PFTESTPA20, is highlighted with a red box.

User	Last name	First name	Department	Building co...	Room N...	Extension	Cost ce...	Internal mail	Company
PFTESTPA20	PFTESTPA20								CITY OF PORTLAND
PFUAT84	PFUAT84								CITY OF PORTLAND

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My Substitution Rules

Create Rule Delete Refresh

Tasks	Assignee	Substitution Type	Status	Rule Activation

Other Users' Substitution Rules

Tasks	Task Owner

Create a Substitution Rule

* Assignee: PFTESTPA20

Assign These Tasks: [Dropdown]

I Want the Assignee To:

Receive My Tasks
You hand over tasks to the assignee for the duration of your planned absence; you can set a start date for this rule.

Fill In for Me
If you are unexpectedly absent, the assignee can take over your tasks completely.

Activation of the Rule:

At Once

On [Date Field]

Do not activate the rule now.

Deactivate this rule:.

Never
The rule is not automatically deactivated on a specified date. You can, however, deactivate or delete it at any time.

On 05/12/2016 [Date Field]

The rule is automatically deactivated on the specified date. You can deactivate or delete it at any time.

OK Cancel

08

With the Assignee now selected, choose the options for this substitution.

By default, **Receive My Tasks** is selected. The other option is **Fill In For Me**.

Beyond the explanatory text below each, what's the key difference between these choices?

If you choose **Fill In For Me**, you'll stop receiving notifications of items sent to you in workflow. If you choose **Receive My Tasks**, you and your substitute will both receive the notifications (helpful, to keep track of work done while you were gone).

Set a time to begin the substitution with **Activation of the Rule**.

Set a time to end the substitution with **Deactivate This Rule**.

Click **OK**.

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My Substitution Rules

Tasks	Assignee	Substitution Type	Status	Rule Activation
	PFTSTPA20 - PFTSTPA20	Receive	Ongoing Ends On 05/12/2016	Turn Off

Other Users' Substitution Rules

Tasks	Task Owner

Note: If you need to change the end date of a substitution, you will need to delete the existing rule and create a new one.

If you will use a substitute frequently, create a rule for that person and leave the end date open. Then you can turn it on and turn it off without having to delete the rule in future.

09

With your substitution set, you can return to this menu at any time to turn it off, delete it, or create a new substitution.

– END –