

# SAP Workflow\_Tasks delegation

## DOCUMENT VALIDATION

| Version | Corporate area                         | Type of document | Approval date |
|---------|--|------------------|---------------|
| 1       | IT & Organization                      | Manual & Guide   | July 2015     |
| 2       | Organization – Business Transformation |                  | March 2020    |

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## SUMMARY

- 1 Creation and activation of substitutes for workflow tasks
- 2 Activating/ deactivating substitutes
- 3 Deleting substitutes for workflow tasks

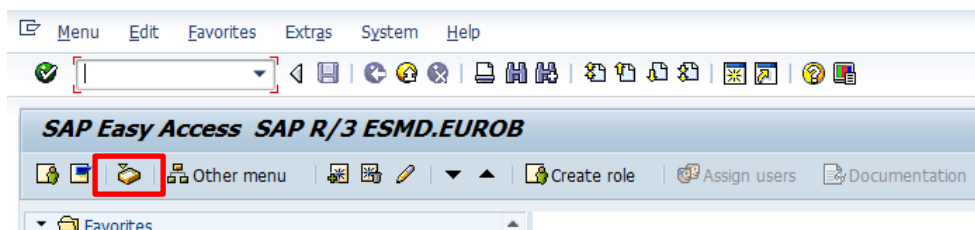
## 1 CREATION AND ACTIVATION OF SUBSTITURES FOR WORKFLOW TASKS

This feature will serve to delegate our review tasks in the Business Workplace of SAP in periods of prolonged absence: holidays, sick leave, etc.

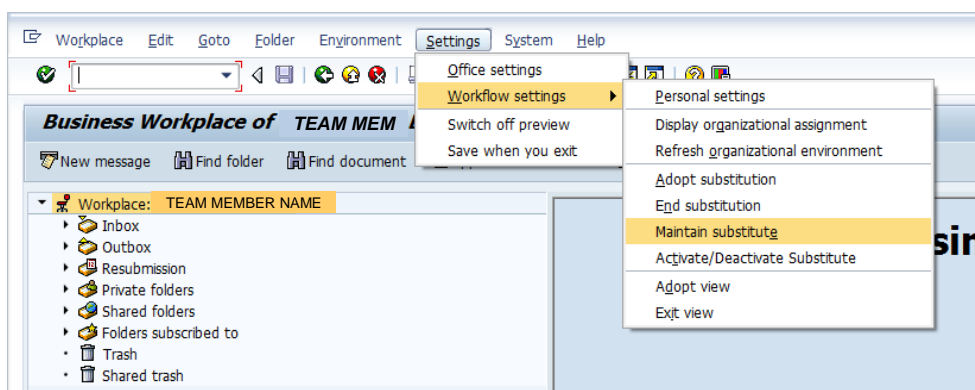
When a substitute is activated for workflow tasks, the person/s assigned may see and treat part or all the tasks that the person who has activated them as substitutes has assigned.

In order to activate a person as a substitute, the following steps are necessary.

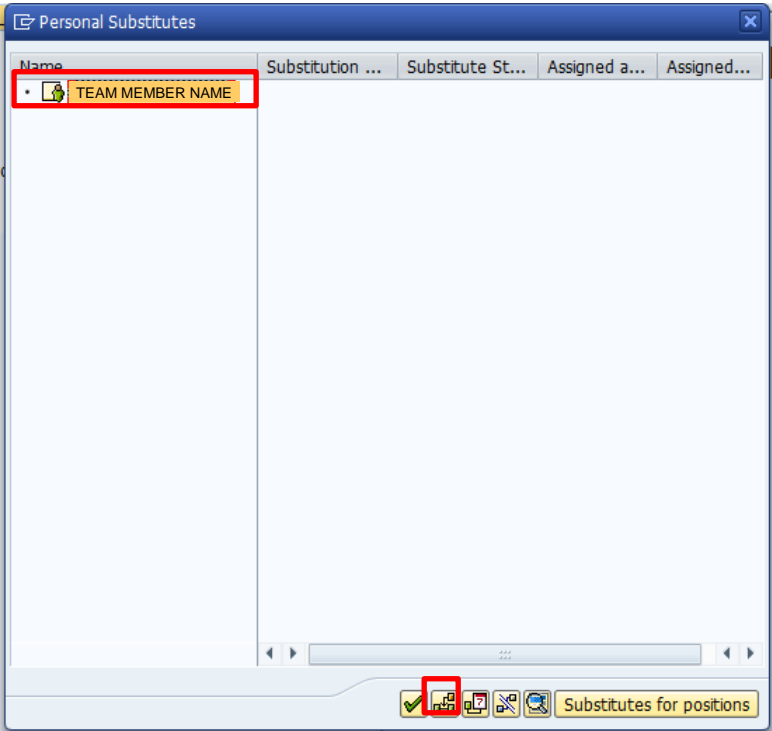
Gain access to the Inbox for workflow tasks (SAP Business Workplace).



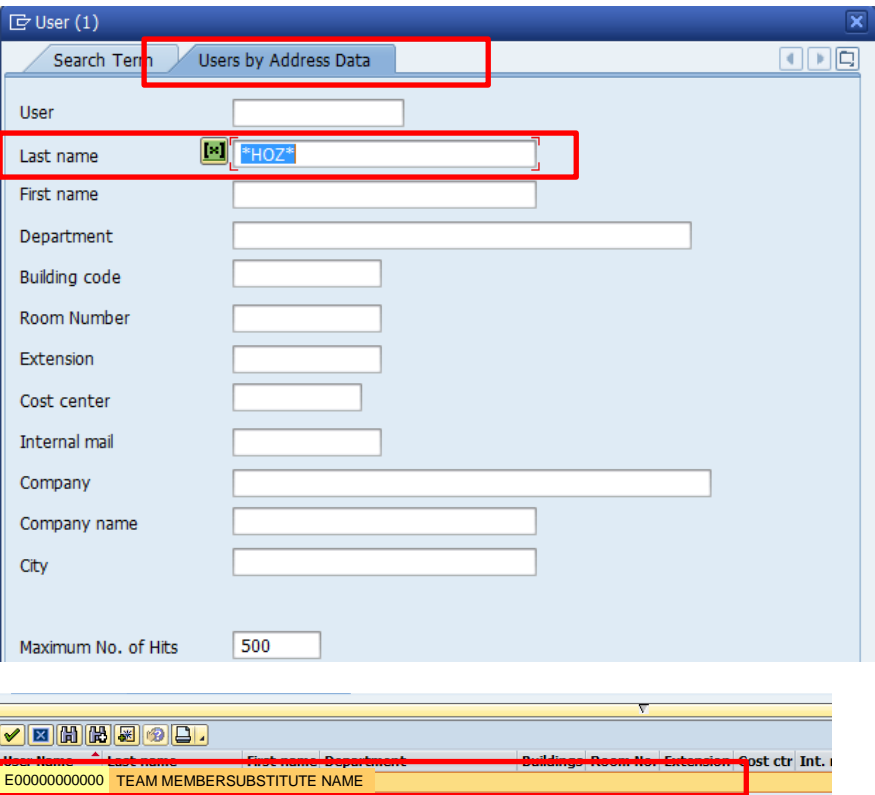
Go to **Settings > Workflow settings> Maintain substitute**



Mark the user and click on **Create substitute** 



Search for the user that you wish to activate as a substitute and select him/her.



Modify the dates of validity of the substitution if this is considered advisable, mark the flag of **Substitution active** and select the delegation profile.

When selecting a delegation profile, the tasks of approval associated with that profile will be delegated.

| PROFILE         | TASKS OF APPROVAL DELEGATED                                      |
|-----------------|--|
| <b>ALL</b>      | All-All the tasks in the inbox                                   |
| <b>FI_PR</b>    | FI-Payment Release-FI Invoices (without prior order)             |
| <b>FI-TM</b>    | FI Travel Management-Travel costs (TRIP module)                  |
| <b>HR_CH</b>    | HR Click & Hire-Approvals for Click & Hire                       |
| <b>MM-IV-II</b> | MM Incoming Invoice-Incidents in MM invoices with previous order |
| <b>MM-PUR</b>   | MM Purchase Order-MM purchase orders                             |
| <b>PR-PUR</b>   | FI PR + MM PUR-FI Invoices + Incidents in MM invoices            |

**If no profile is selected or if the profile ALL is selected**, all the tasks in the inbox will be delegated. In any other case, we will only be able to select a profile of each of the substitutes that we create.

If you wish to do so, it is possible to create more than one substitute although it is advisable to do so only if you wish to assign different profiles of delegation. For this purpose, you should repeat the steps indicated above.

| Personal Substitutes |                      |                  |               |           |
|----------------------|----------------------|------------------|---------------|-----------|
| Name                 | Substitution Profile | Substitute St... | Assigned a... | Assi...   |
| TEAM MEMBER NAME     |                      |                  |               |           |
| • SUBSTITUTE NAME 1  | FI Payment Release   | Activated        | 14.07.2015    | Unlimited |
| • SUBSTITUTE NAME 2  | MM Purchase Order    | Activated        | 14.07.2015    | Unlimited |

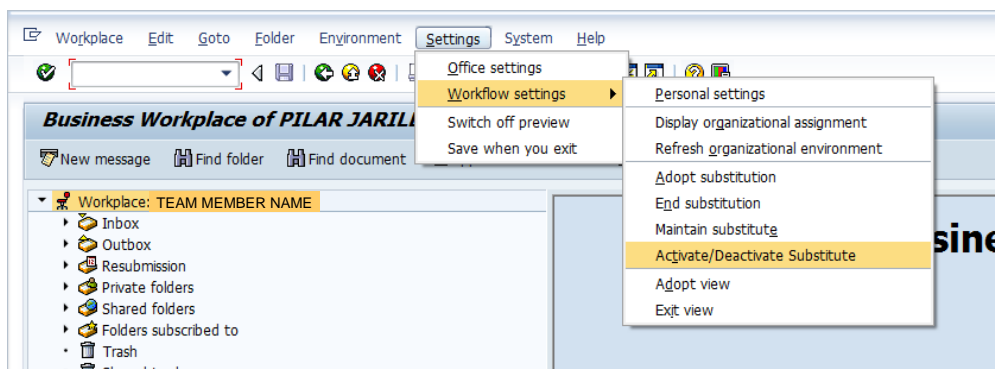
In this example, the first substitute would receive the approvals of FI invoices, and the second substitute would receive the authorisation of MM purchase orders.


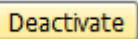
\*\*\* Please, remember to inform the selected substitute. SAP does not notify the substitutions.

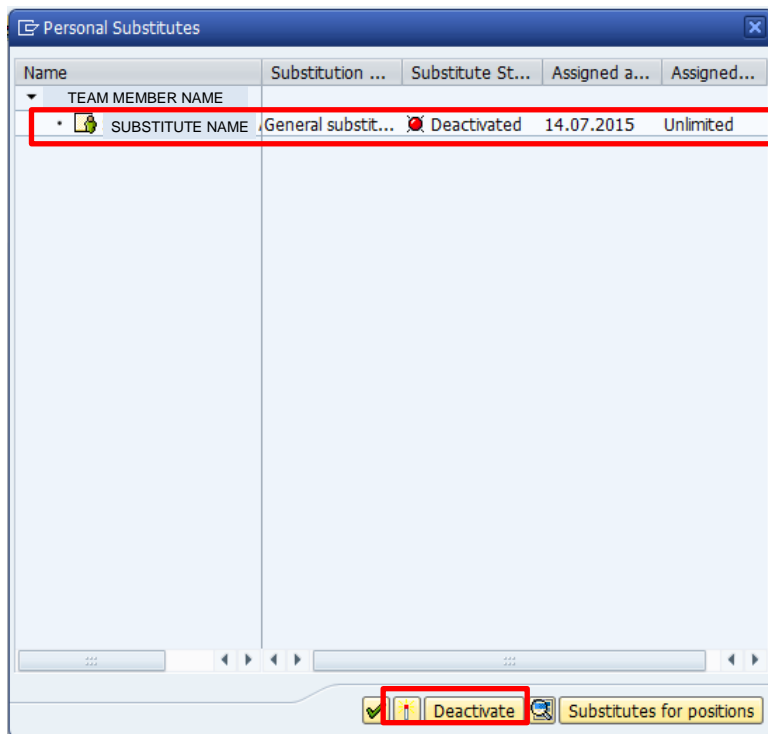
## 2 ACTIVATING/ DEACTIVATING SUBSTITUTES

After our return, we will be able to deactivate the substitution without deleting the person designated, in such a manner that we will be able to again activate him/her as a substitute in the future. **However, any change in the substitution profile assigned to that person, must be handled through the option of Update substitution explained in the foregoing point.**

In order to activate/deactivate a substitute, go to **Settings > Workflow settings > Activate/Deactivate Substitute** on the menu.



Select the substitute who you wish to activate/deactivate and click on the activate or deactivate buttons  



### 3 DELETING SUBSTITUTES FOR WORKFLOW TASKS

In order to delete a substitute, do so using **Settings > Workflow options > Maintain**, by clicking on the substitute and pressing **Delete substitute** 