## SAP Business Workplace – Personal Substitution

Go to transaction SBWP (SAP Business Workplace)
Go to following path to set the personal substitution as shown below
Settings-→Workflow settings-→Edit Substitute

| 🗮 Workplace Edit Goto Eolder Environment | <u>Settings</u> System <u>H</u> elp |   |
|--|-------------------------------------|---|
|  | Office settings                     | a of Venkata Phani Diwakar Marenalli          |
|  | Workflow settings                   | Personal settings                             |
| ✓ 🔄 🖂 New message                        | Switch off preview                  | Display organizational assignment Dution list |
|  | Save when you exit                  | Refresh organizational environment            |
|  |                                     | Adopt substitution                            |
| > 1 Outbox                               |                                     | End substitution                              |
| > 🚊 Resubmission                         |                                     | Edit Substitute                               |
| > 🖎 Private folders                      |                                     |   |
| > 🔮 Shared folders                       |                                     | Ac <u>t</u> ivate/Deactivate Substitute       |
| > 📩 Subscribed Folders                   |                                     | Apply View                                    |
| <u> </u> Trash                           |                                     | E de deux                                     |
| 🗑 Shared trash                           |                                     | EXIL VIEW                                     |
|  |                                     |   |

## 2. Following screen appears

| <   | SAP                      | Business W                        | Iorkplace of Ven     | kata Phani Diwak      | ar Marepalli            |
|-----|--------------------------|-----------------------------------|----------------------|-----------------------|-------------------------|
| ~   | ~ ~                      | =                                 |                      | 5                     | ^                       |
|     |                          |                                   |                      |                       |                         |
| ~ 🌡 | Workplace: Venkata Phani | Name                              | Substitution Profile | Substitute Status (Ac | Assigned as of          |
| >   | 🛓 Inbox                  | 🗷 Venkata Phani Diwakar Marepalli |                      |                       |                         |
| >   | ሷ Outbox                 |                                   |                      |                       |                         |
| >   | 🚊 Resubmission           |                                   |                      |                       |                         |
| >   | 🖎 Private folders        |                                   |                      |                       |                         |
| >   | 😩 Shared folders         |                                   |                      |                       |                         |
| >   | ≛ Subscribed Folders     |                                   |                      |                       |                         |
|     | 前 Trash                  |                                   |                      |                       |                         |
|     | 前 Shared trash           |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   | < >                  |                       | $\leftrightarrow$       |
|     |                          |                                   |                      |                       |                         |
|     |                          |                                   | $\checkmark$         | 👗 📋 🚠 🍳 Su            | bstitutes for positions |

- 3. Place the cursor on the name and click on the above highlighted button
- 4. Following screen appears

| ≡  | User (3)                           | ×                 |
|--|------------------------------------|-------------------|
| S: Search Term Use   | rs by Address Data                 | >~                |
| S: Search Term Use<br>User:<br>Last name:<br>First name:<br>Department:<br>Building code:<br>Room Number:<br>Extension:<br>Cost center:<br>Internal mail:<br>Company:<br>Company name: | rs by Address Data                 | > ~               |
| Maximum No. of Hits:   | 500<br>✓ Start Search ↓ Multiple S | Selection 🛛 Close |

- 5. Provide the user ID if you know it. Otherwise, based on the first name and last name find out the user id to be substituted. [*Note: during testing, we found using the user ID more successful*]
- The person you choose as a substitute MUST already have the authorisation to approve invoices etc. If they do not have this permission, they will not be able to approve on your behalf.

| ≡                     | User (3)                      | ×                   |
|-----------------------|-------------------------------|---------------------|
| S: Search Term Users  | by Address Data               | >~                  |
| User:<br>Last name: 🖃 | shaik                         | 7                   |
| First name:           | -                             |                     |
| Department:           |                               |                     |
| Building code:        |                               |                     |
| Room Number:          |                               | -                   |
| Extension:            |                               | -                   |
| Cost center:          |                               | -                   |
| Internal mail:        |                               |                     |
| Company:              |                               |                     |
| Company name:         |                               | _                   |
| City:                 |                               |                     |
| Maximum No. of Hits:  | 500 🗸 Start Search 💠 Multiple | e Selection 💌 Close |

6. Click on Start search button and following screen appears

|   | S: Sear   | ch Term           | Users by Ad | dress Data | _         |          |           | >~       |
|---|-----------|-------------------|-------------|------------|-----------|----------|-----------|----------|
| 5 |           | x) <b>*</b> [2] ( |             | ~          |           |          |           |          |
|   | User Name | Last name         | First name  | Department | Buildings | Room No. | Extension | Cost ctr |
|   | EOISHAIK  | SHAIK             | IMDADULLA   | Commercial |           |          |           |          |
| 5 | EOSHSHAIK | SHAIK             | SHAMSUDDIN  | 1          |           |          |           |          |
|   |           |                   |             | •          |           |          |           |          |

7. Select user id to be substituted as shown

Personal Substitutes

| <br>≡                   | D    | etail Screen Subst   | itution          | × |
|-------------------------|------|----------------------|------------------|---|
| <br>Substitute for      | Venk | ata Phani Diwakar Ma | repalli          |   |
| Substitute              | Shar | nsuddin Shaik        |                  |   |
|                         | V P  | ersonal substitution |                  |   |
|                         |      |                      |                  |   |
| Substitution data       |      | 1                    |                  |   |
| Validity                | 17.  | 01.2023 Lto          | 31.12.9999       |   |
| Profile                 |      | Gene                 | ral substitution |   |
|                         |      |                      |                  |   |
| <br>Substitution active |      |                      |                  |   |
|                         |      |                      |                  |   |
|                         |      |                      | ]                |   |
| <br>                    |      | ( )                  |                  |   |
|                         |      |                      |                  |   |

Provide the validity period for which substitution is required – ensure a start and end date is chosen.

| If you check the check box "Substitution active" $\ {}^{arsigma}$ | Substitution active   | ┙, then during that |
|---|-----------------------|---------------------|
| period work items are forwarded to the substitute u               | ser id automatically. | /.                  |

Click on the Save button.

≡

9. If substitution check box is not checked □ Substitution active , you must manually do the substitution using Adopt substitution as shown.
Settings-→Workflow settings-→Adopt substitution

|   | ≡   | Wo <u>r</u> kplace | <u>E</u> dit | <u>G</u> oto | <u>F</u> older | En <u>v</u> ironment | <u>S</u> ettings | System         | <u>H</u> elp |                                    |       |
|---|-----|--------------------|--------------|--------------|----------------|----------------------|------------------|----------------|--------------|------------------------------------|-------|
|   | 2   | SAP                |              |              |                |                      | <u>O</u> ffic    | e settings     |              | a of Venkata Phani Diwakar Ma      | arana |
|   |     |                    |              |              | _              |                      | Wor              | kflow setting  | s >          | Personal settings                  | -pa   |
|   | ~   |                    |              | ~            | 🖾 Ne           | w message            | Swit             | ch off previev | N            | Display organizational assignment  | putio |
|   |     |                    | . ) (        | ta Dhau'     | Disalar        | Manana - 112         | Save             | e when you e   | exit         | Refresh organizational environment |       |
| - | ~ 4 |                    | : venка      | ta Phani     | Diwakar        | Marepalli            |                  |                |              | Adopt substitution                 | Vc    |
|   | >   |                    |              |              |                |                      |                  |                |              | End substitution                   |       |
|   | >   | Resubm             | ission       |              |                |                      |                  |                |              |                                    |       |
|   | >   | R Private f        | olders       |              |                |                      |                  |                |              |                                    |       |
|   | >   | 🚊 Shared f         | folders      |              |                |                      |                  |                |              | Activate/Deactivate Substitute     |       |
|   | >   | 🛓 Subscrib         | oed Fol      | ders         |                |                      |                  |                |              | App <u>l</u> y View                |       |
|   |     | 前 Trash            |              |              |                |                      |                  |                |              | Exit view                          |       |
|   |     | 前 Shared t         | trash        |              |                |                      |                  |                |              |                                    |       |
| - |     |                    |              |              |                |                      |                  |                |              |                                    |       |

Also, you can do it by clicking on End substitution.

To do substitution for others, then use the transaction code **RMPS\_SET\_SUBSTITUTE.** 

- 10. For your substitute to approve Workflow items in your absence, they will need to have the corresponding GL and Cost Centre codes. Please ensure you have provided them with this before you are away from work.
  - These codes will need to be entered at approval stage. Ensure they know how and when to do this.
- 11. When you return from annual leave, ensure you have cancelled the substitution so your settings return to normal. Do this by clicking Settings - $\rightarrow$ Workflow settings- $\rightarrow$ End substitution