



Shopping Cart: Designating a Substitute Approver

Use this Job Aid:

- If you are a Shopping Cart Approver and would like to delegate a “Substitute Approver” on an as-needed basis.

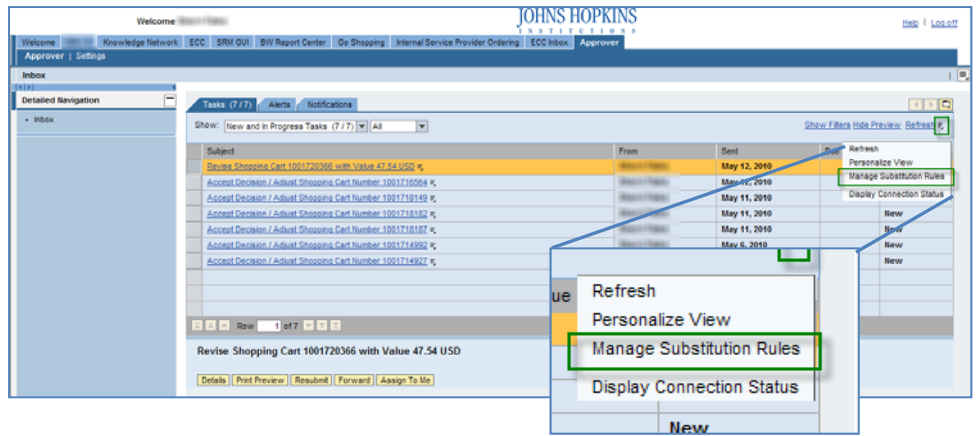
BEFORE YOU BEGIN

You should have the name and JHED ID of the co-worker(s) you would like to be your “Substitute.”

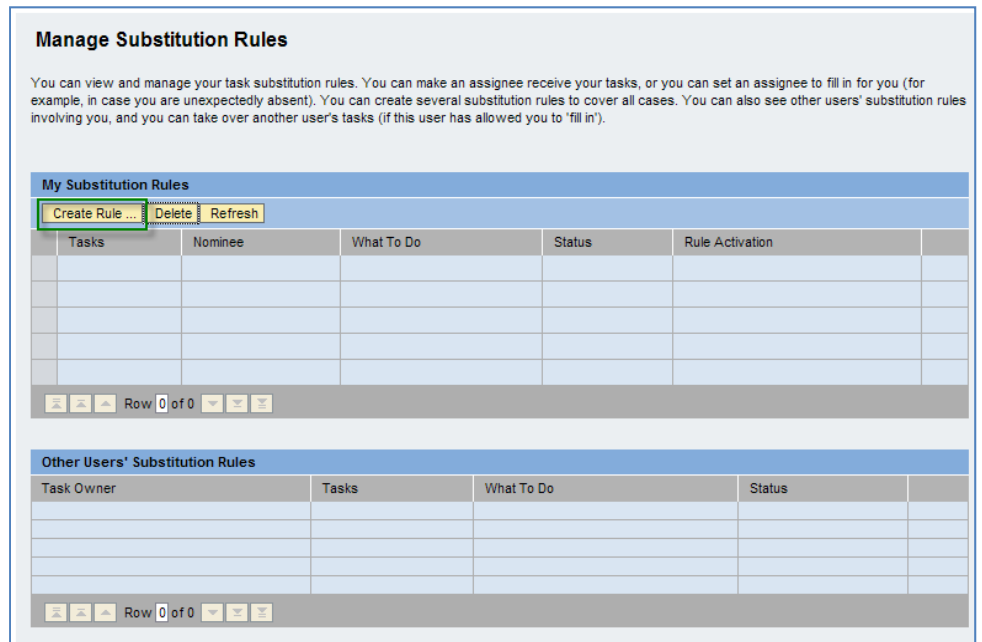
Designating a Substitute Approver

You can allow another SAP user to view and approve SRM Shopping Carts that are routed to you for approval, provided that they also have the Shopping Cart Approver role. Note that this is different than using Team Carts. Designating a “Substitute Approver” assigns the substitute on an “as-needed” basis, rather than on an ongoing basis.

- 1. Go to Approver Tab.** At the far right side of the screen (next to the “Refresh” link) there is a small drop-down icon. Click the drop-down icon and then select “**Manage Substitution Rules.**”



- 2. Manage Substitution Rules.** When the “Manage Substitution Rules” pop-up appears, select “**Create Rule.**”



3. Create a Substitution Rule. You can enter the User ID or Search for the person you want to add as a Substitute:

- Enter the User ID of the person you want to designate as a Substitute (if you know it) in the “Nominee” field

OR

- Click “Select” to “Search for People,” highlight the row of the Person/User you want as your Substitute and then click “Apply.”

4. Define Rule. Check the population of the fields on this screen:

- **Nominee:** contains the name of the person you want to be your Substitute
- **Assign These Tasks:** Set to “All”

• **I Want the Nominee to:**

Receive My Tasks – *Substitute will receive your Carts*

OR

Fill in For Me – *Substitute can opt to get your Carts (useful for an unexpected absence)*

- Click “Next” to continue.

5. Set Rule Activation. Define when you want the Substitution to become active:

- To activate immediately - select “At Once”

OR

- To designate a specific future date, select “On” and then enter the date.

- Click **Save**

6. Disabling Substitution Rules. The Manage Substitution Rules screen will show the rules you have established:

- Click **“Turn Off”** to end the substitution rule, the option to **“Turn On”** will appear and you can activate the rule again in the future.

OR

- To remove the substitution entirely, highlight the row and click **“Delete.”**

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	Wesley, L. (You)	Receives my tasks	Ongoing	Successful	Turn Off

Row 1 of 1