Configuring and setting up substitutions in SAP Workflow

Purpose:
SAP’s Workflow engine is a very robust and powerful tool that brings executable tasks and notifications to users (“agents”) inboxes. Classic examples of tasks are approvals of purchase orders, expense reports or leave-of-absence requests. Usually an employee submits an expense report that may go thru one or more approval steps. The approval tasks are “flown” into the inboxes of the approvers. In SAP, the inbox is generally the “SAP inbox” accessed via transaction code SBWP. On the SAP portal the inbox is the UWL – the Universal Work List. SAP also lets you flow the tasks into Lotus Notes and Outlook. Many approval tasks require to be acted upon before a deadline. A workflow sitting unapproved in the inbox of a manager who is on a month-long vacation could be a problem for the organization (an ISP vendor’s unpaid bills, or timesheets that were not billed because they were not approved) or an employee (unapproved expense report that has started attracting late fees from the credit card company). To address such issues, SAP workflow provides a substitution mechanism. The manager/approver nominates a substitute for the duration of his or her absence.

Configuration:
Substitution works out of the box without any configuration as long as the technical configuration is complete (Tcode SWU3 – Automatic customizing). Using substitutions without further fine tuning means that delegation is 100 percent -- all tasks of an approver are resent to the substitute. If the approver wishes that administrative approvals (timesheets, leave requests) be approved by an assistant but othersensitive approvals go to a peer, then further customizing needs to be done. The assistant might be set up as a substitute with one profile and the peer as another substitute with a different profile. The customizing steps to do this are (based on an ECC 6.0 system)

a. Define classification labels for tasks
To define classification labels, go to SPRO>SAP Netweaver->Application Server->Business Management->SAP Business Workflow->Basic Settings->Maintain Task Classes. Here you freely define classification labels with descriptions. Make sure that the descriptions are easily understood by your users.
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Structure

- SAP Customizing Implementation Guide
  - Activate Business Functions
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      - System Administration
        - Web Dynpro ABAP
      - SAP List Viewer (ALV)
      - Frontend Services
      - Documentation Tools
      - Business Management
      - SAP Business Workflow
        - Maintain Standard Settings
          - Basic Settings
          - Set Active Plan Version
          - Number Range Maintenance
          - Maintain Evaluation Paths
          - Specify sequence of languages available
          - Tools
          - Maintain prefix numbers
          - Maintain task classes
            - Substitute Profile
          - Set up views for Business Workplace
          - Maintain assignments for SAP organizational object types
b. Define substitution profiles

To define substitution profiles, go to SPRO->SAP Netweaver->Application Server->Business Management->SAP Business Workflow->Basic Settings->Substitute Profile->Define

Substitute Profile.

A substitution profile defines what tasks a substitute approver sees in his/her inbox. My system settings are as shown:
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            - Substitute Profile
              - Define Substitute Profile
              - Assign substitute profile
          - Set up views for Business Workplace
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c. Group the classifications into profiles.

In the previous step, we just defined names for substitution profiles. In this step, we assign the classifications to the profiles and make their definition complete. To assign the classifications to profiles, go to SPRO>SAP Netweaver->Application Server- >Business Management->SAP Business Workflow->Basic Settings->Substitute Profile- >Assign Substitute profile.

One or more classifications can be assigned to a profile. A classification can be assigned to more than one profile. Here is how my assignments look:
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d. Classify the workflow tasks.

The final step, though not technically a customizing activity, is classifying the tasks. Tasks are classified in transaction code PFTC. Open up a task in change or display mode in PFTC. To classify it, go to Additional Data->Classification->Create. Drop down on the classification field and pick one of the available classifications.
Setting up substitutions

An approver can pick a substitute for a given time period and assign the substitute a profile. To pick a substitute from SBWP, go to
Settings -> Workflow settings -> Maintain substitute.

Click on your name and press F5 to pick a substitute using the search help dialog. Then specify dates, pick a profile and click on the Substitution active check box.

Maintaining substitutes on the portal is very similar to how it is done in SBWP. In the portal UWL, click on the tiny button at the top right of the UWL list and choose Manage Substitution Rules.
In the “Assign These Tasks” drop down, pick the profiles that you want to assign to the substitute. The rest of the settings are self-explanatory.
Tables to know

HRP1217 This table stores the classification of tasks. Field TCLASS contains the classifications and field OTJID contains the task name. HRUS_D2 This table contains the approver, the substitute, the begin and end dates, the substitution profile and whether the substitution is active or not. This is the main part of your document where you talk through the system logic or behavior you are explaining. Use pictures to emphasize the points you are trying to make or to illustrate the transactions, selection screens, reports, etc. that you are discussing.