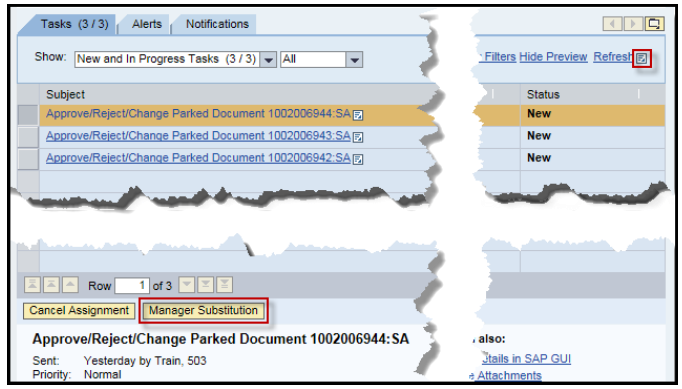
BUworks Finance Newsletter

Boston University BUworks Finance Newsletter **October 2015**

Dear Colleagues,

The October 2015 issue concentrates on the **Manager Substitution Rules** within the **SAP Universal Worklist** (**UWL**). This procedure provides individuals with the ability to setup other users as substitutes either permanently or temporarily, for approval of task items on your behalf.



Manager Substitution Rules

Manager Substitution function is available through the Worklist tab on the BU Central Portal and allows you to assign back up support for during planned and unplanned time off from work. To set up a rule access the **Worklist** task by means of the **Manager Substitution** button or thru **Manager Substitution Rules** Icon located in the sub-tab area.

Substituting Options

There are two types of setup for substitution rules that can be created:

Receive My Tasks

- This option designates someone as your substitute for a duration of time and allows the assignee immediately access to start seeing designated tasks.
- This option is usually utilized on planned absence such as when an employee goes on vacations, planned sick day, or training workshops.

Fill In for Me

- This option designates someone to substitute for your tasks in your absence.
- Requires one more step from the assignee (**Take over** selection) to make the items visible in his/her tasks list.
- This option is mainly used in scenarios where there is an unexpected long term absence or an individual is out indefinitely due to an emergency.

We recommend that on occasion a review of departmental substitution rules is performed and also suggest for a master list to be kept for when a change is required to be made. Click here to view the Work Instructions on **Worklist User Guide for Manager Substitution rules**.

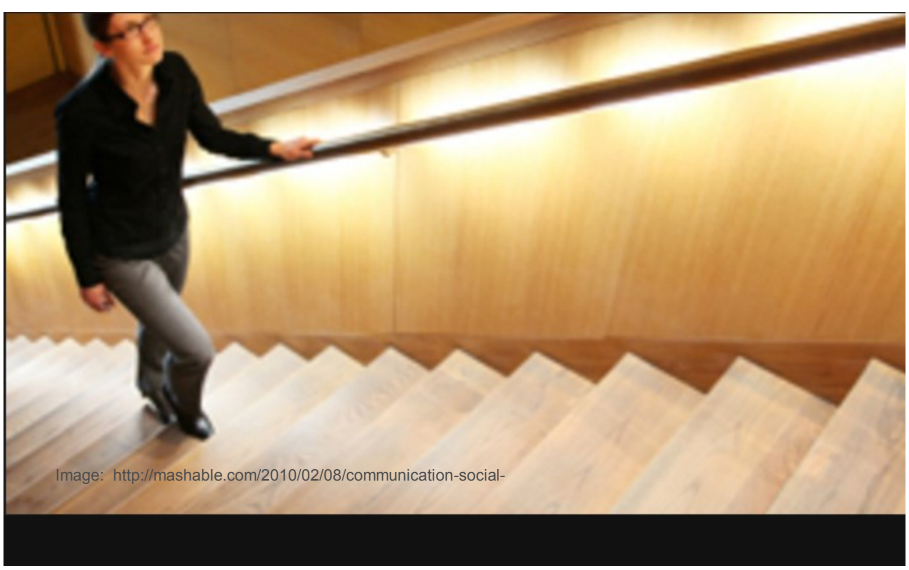


Image: http://mashable.com/2010/02/08/communication-social-

In This Issue

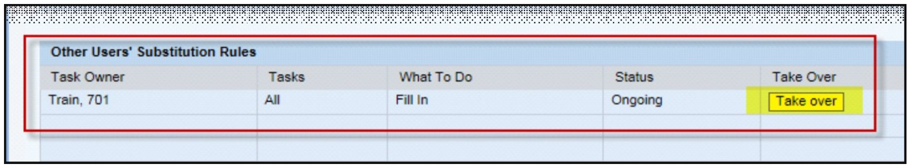
Quote of the Month: "Leadership and learning are indispensable to each other"- John F. Kennedy.

FAQs on Manager Substitution Rules

1. *What is the difference between **Receive my tasks** option and **Fill in for me** Worklist substitute rule?*

   Receive my task option allows the assignee to immediately start seeing designated tasks. This option will designate someone as the substitute at all times and is considered an "**Active Substitution**"

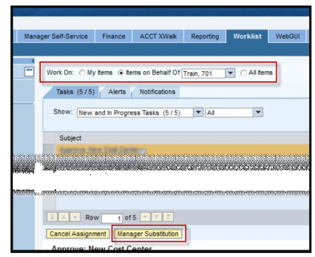
   The **Fill in for me** option is utilized for a limited time period. This option requires an additional step for assignee to make the tasks items will not become visible until assignee clicks on **Take Over** button which is visible and available on the other users' **Substitution Rules** table.

   This option is mainly used for scenario in which an unexpected absence of the original user, especially for a long period. such as emergency circumstance (of unplanned time off).

2. *What is the difference between **Substitution** and **Forwarding** a task?*

   A forwarded item will only be visible as a task for the recipient assigned. In the case of substitution, both the original user and the assignee can still see the tasks and work on them.

3. When using the ***Fill in for me***, how do I distinguish the items belonging to the user?

   Go to **Worklist** and click on drop down menu and select ***"items on behalf of xxxxxxxx".*** Assigners' task should display. If they do not display click on the **Refresh** button.

WebGUI Real Time Reports

Tips and Tricks

Here are some helpful tips and tricks to use when navigating within the **WebGUI ECC** system:

1. Use transaction code **FMRP_RFFMEP1AX - All Posting** to generate a real time report of commitments and actuals made during a given period for a responsible **Cost Center** or **Internal Order**.

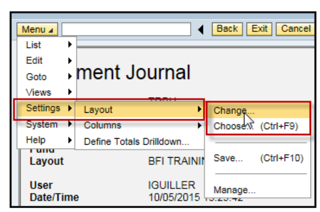
   Click here to review the Work Instruction help document.

2. Use the **Create Personal Variant** function in WebGUI for frequently executed (run) reports. Once a selection criteria has been set and saved as a variant there will no longer be a need to re-enter.

   Go into the transaction code and click on **Get Variant** button and select variant created.

   Click here to review the Work Instruction document.

3. Once a report has been **Execute** a defaulted layout will display, however additional options are available allowing for *change to layout* or *selection of* another report.

   Click on **Menu** button, go to settings, layout and change or choose new layout. Go to » button if **Layout** selections are not available under **Menu** button.

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