



SRM Workflow: Approvals; Substitution Rules; Adhoc Approvers & Reviewers; Basic Workflow Settings

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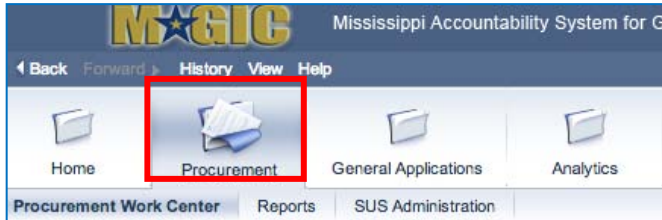
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Overview/Audience

This job aid is for all procurement users in SRM who will be using workflow for Shopping Carts, RFXs, Contracts, or Purchase Orders. This documentation covers Approvals, managing Substitution Rules, adding Ad hoc Approvers and Reviewers, and updating workflow settings.

How do I get to Workflow?

- (1) From MAGIC portal, go to the Procurement tab:



- (2) Select Workflow from the list:



- (3) Tasks assigned to the user are displayed. This is the main area for your workflow.

Subject	Sent Date	Due Date	Status
Revise Contract Number 8800001185	Yesterday		New
Approve Contract Number 8200014047	Jun 4, 2014		New
Accept Decision / Adjust Purchase order Number 4000002470	Jun 3, 2014		New
Approve Contract Number 8200014035	May 20, 2014		New
Approve Change version of contract Number 8200012860	May 7, 2014		New
Revise Contract Number 8800001191	May 5, 2014		New
Revise Purchase order Number 4000002399	May 2, 2014		New
Approve Change version of purchase order Number 4600000374	Apr 11, 2014		New
Approve Contract Number 8200013066	Mar 4, 2014		New
Approve RFX Number 3140000158	Feb 18, 2014		New

Approvals

Purpose:

Shopping Carts, Purchase Orders, Contracts, and RFX documents need to be reviewed prior to follow-on processes internally or with Vendors. Approvers have the ability to approve or reject items and can add notes related to their decision.

How do I get to Approvals?

After the requestor places the order, the item will route to the first Approver. The Approver will select the item from their inbox.

Cannot connect to the provider [Details](#)

Alerts **Tasks (25 / 25)** Notifications

Show: **New and In Progress Tasks (25 / 25)** All

Subject	Sent Date	Due Date	Status
Approve Shopping Cart 1000003051 with Value 5,500.00 USD	Today		New
Approve Shopping Cart 1000003050 with Value 5,500.00 USD	Jun 25, 2014		New
Complete Change version of purchase order Number 4000002400 of Robert Fulcher	May 5, 2014		New
Approve Shopping Cart 1000002974 with Value 3,000.00 USD	Apr 30, 2014		New

Functionality:

(1) For Shopping Carts, the Approver can select the “Display/Edit Agents” link and add an Approval Note.

Approve Shopping Cart: 1000003051

Number 1000003051 Document Name RF332297 06/25/2014 11:00 Status Awaiting Approval Created On 06/25/2014 11:00:49 Created By Robert Fulcher

Submit Close Print Preview Save Check

General Data

Buy on Behalf of: Robert Fulcher

Name of shopping cart: RF332297 06/25/2014 11:00

Header Data: [Values](#)

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Document Changes: [Display](#)

Approval Process Overview

Current Status: Active

Current Process Step: SRM Shopping Cart Approval (1)

Currently Processed By: Susan Dodder

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header Approval Note Approver note goes here

Header Approval Status

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Approval (1)	Open (No Decision Made)	Susan Dodder	06/30/2014 09:38:03		
002	SRM Shopping Cart Approval (1)	Open (No Decision Made)	Milo Crabtree			

- (2) For Shopping Carts, the Approver will select the Reject or Approve radio button at the line item level and then select Submit.

Approve Shopping Cart:100003051

Number 100003051 Document Name RF332297 06/25/2014 11:00 Status Awaiting Approval Created On 06/25/2014 11:00:49 Created By Robert Fulcher

Submit Close Print Preview Save Check

General Data

Buy on Behalf of: Robert Fulcher Approver note goes here

Name of shopping cart: RF332297 06/25/2014 11:00

Header Data: [Values](#)

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Document Changes: [Display](#)

Item Overview

Details Add Item Copy Paste Duplicate Delete Process All Items

Line Number	Reject	Approve	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Net Value	Currency	P
1	<input type="radio"/>	<input checked="" type="radio"/>	Material		Test	00505	Abrasives Eq & Tools	1	EA	5,500.00	5,500.00	USD	

- (3) You can now see that the Status of the first step has updated to Approved after Susan approved this Shopping Cart. The Processed On date indicates the date and time Susan approved the document. Note that the overall Shopping Cart is not yet approved, as Milo was added as an ADHOC Approver.

Approval Process Overview

Current Status: Active Header Approval Note Approver note goes here (SD322582 06/30/2014 09:50:58 CST) Add Comment

Current Process Step: SRM Shopping Cart Approval (1)

Currently Processed By: Milo Crabtree

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header Approval Status

Add Approver Remove Approver

Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On	Forwarded By
001	SRM Shopping Cart Approval (1)	Approved	SC Fiscal Approval	Susan Dodder	06/30/2014 09:38:03	06/30/2014 09:54:14	
002	SRM Shopping Cart Approval (1)	Open (No Decision Made)	ADHOC	Milo Crabtree	06/30/2014 09:54:19		

- (4) For POs, Contracts, and RFxs, the Approver selects the Approval tab to add an Approval Note and has buttons to Approve or Reject.

Display Purchase Order (Approval mode):4000002375

Purchase Order Number 4000002375 Purchase Order Type General PO Status Awaiting Approval Document Date 04/29/2014 Total Value

Approve Reject Save Close Export

Overview Header Items Notes and Attachments **Approval** Tracking Supplier Ordering Address

Current Status: Active

Current Process Step: SRM Purchase Order Completion

Currently Processed By: Susan Dodder

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header Approval Note

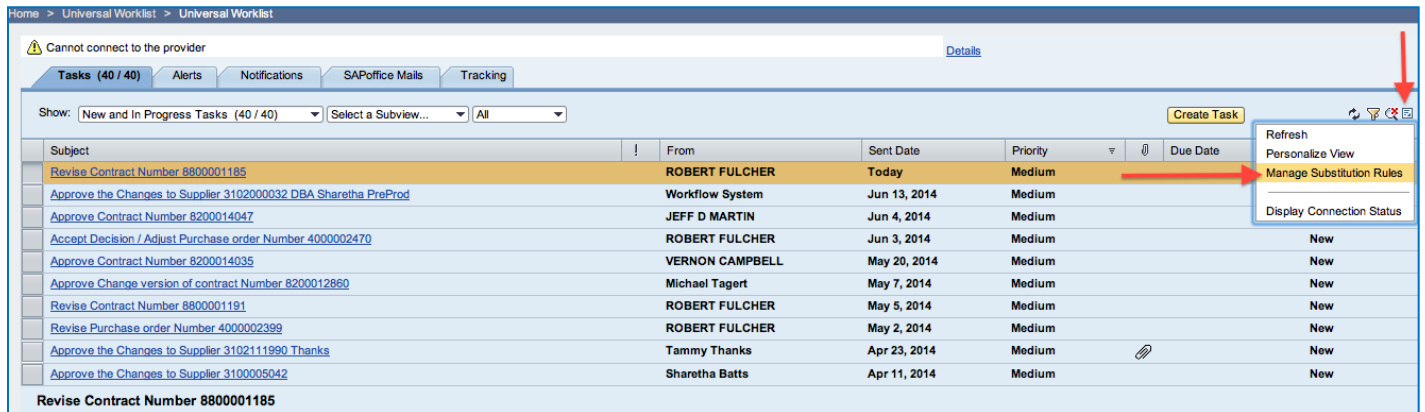
Substitution Rules

Purpose:

Substitution Rules are used when you will be out of the office and someone else will be filling in for you. You can set a specific date range for the substitution to be active, or you can activate it before you leave and turn it off when you return. You can also select a user to be a "Fill in." Selecting a Fill in allows your substitute to activate the substitution themselves in case you are unable to activate it yourself. You can only successfully add users as substitutes who are part of your Agency and are Approvers for workflows (i.e. these individuals must have approver role assigned by security).

How do I get to Substitution Rules?

Select icon on far right, then select Manage Substitution Rules from the drop down list.



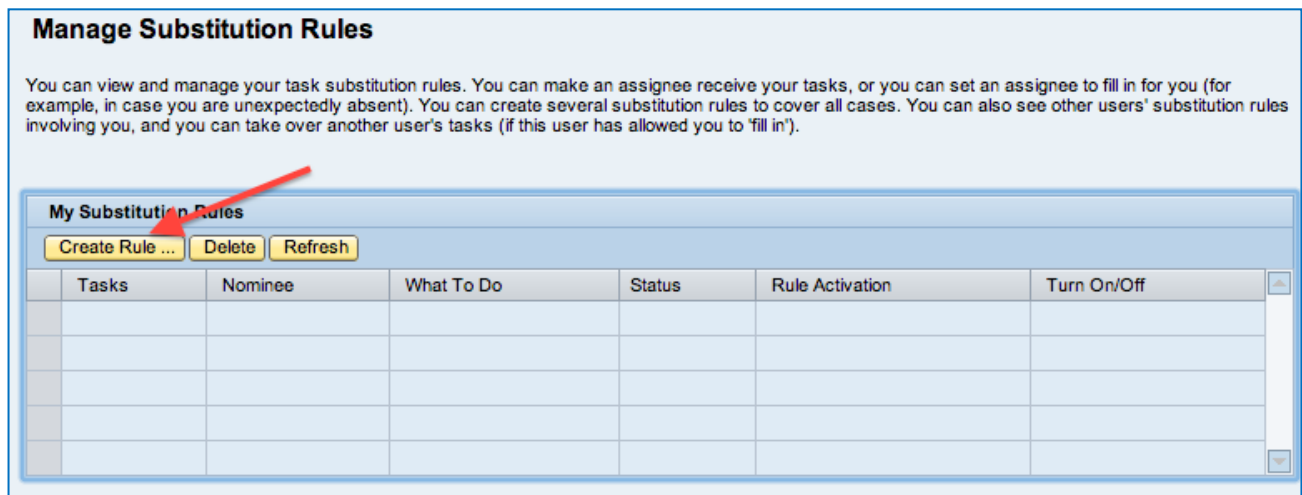
The screenshot shows the 'Universal Worklist' interface. At the top, there's a navigation bar with 'Home > Universal Worklist > Universal Worklist'. Below that, a warning message says 'Cannot connect to the provider'. The main area has tabs for 'Tasks (40 / 40)', 'Alerts', 'Notifications', 'SAPoffice Mails', and 'Tracking'. A 'Show:' dropdown is set to 'New and In Progress Tasks (40 / 40)'. A table lists tasks with columns: Subject, From, Sent Date, Priority, Due Date, and a status column. The first task is 'Revise Contract Number 8800001185' by 'ROBERT FULCHER' due 'Today' with 'Medium' priority. A dropdown menu is open on the right, showing options: 'Refresh', 'Personalize View', 'Manage Substitution Rules' (highlighted), and 'Display Connection Status'. A red arrow points to the 'Manage Substitution Rules' option.

Subject	From	Sent Date	Priority	Due Date	
Revise Contract Number 8800001185	ROBERT FULCHER	Today	Medium		
Approve the Changes to Supplier 3102000032 DBA Sharetha PreProd	Workflow System	Jun 13, 2014	Medium		
Approve Contract Number 8200014047	JEFF D MARTIN	Jun 4, 2014	Medium		
Accept Decision / Adjust Purchase order Number 4000002470	ROBERT FULCHER	Jun 3, 2014	Medium		New
Approve Contract Number 8200014035	VERNON CAMPBELL	May 20, 2014	Medium		New
Approve Change version of contract Number 8200012860	Michael Tagert	May 7, 2014	Medium		New
Revise Contract Number 8800001191	ROBERT FULCHER	May 5, 2014	Medium		New
Revise Purchase order Number 4000002399	ROBERT FULCHER	May 2, 2014	Medium		New
Approve the Changes to Supplier 3102111990 Thanks	Tammy Thanks	Apr 23, 2014	Medium		New
Approve the Changes to Supplier 3100005042	Sharetha Batts	Apr 11, 2014	Medium		New

Functionality:

To create a new Substitution Rule:

1. Select Create Rule button.



The screenshot shows the 'Manage Substitution Rules' dialog box. It has a title bar 'Manage Substitution Rules' and a description: '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').' Below the description is a section titled 'My Substitution Rules' with buttons for 'Create Rule ...', 'Delete', and 'Refresh'. A red arrow points to the 'Create Rule ...' button. Below the buttons is a table with columns: 'Tasks', 'Nominee', 'What To Do', 'Status', 'Rule Activation', and 'Turn On/Off'. The table is currently empty.

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
-------	---------	------------	--------	-----------------	-------------

2. Click Select button to choose user for substitution.

Create a Substitution Rule

You can define which tasks you want to assign to an assignee. You can either make the assignee receive your tasks (for example, when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you are unexpectedly absent).

1 Define Rule 2 Set Rule Activation

Nominee: **Select...**

Assign These Tasks: All

The nominee is the substitute for all tasks

I Want the Nominee to:

Receive My Tasks
You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule

Fill In For Me
If you are unexpectedly absent, the assignee can take over your tasks completely.

Next Cancel

3. Enter name of user and then select Search button. Select user to be your substitute and then select Apply button.

Find People

Search For Names: **Search**

Current Selection

User
Melonie Gore

Apply Cancel

4. User selected now displays as Nominee. Then select Next button.

Create a Substitution Rule

You can define which tasks you want to assign to an assignee. You can either make the assignee receive your tasks (for example, when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you are unexpectedly absent).

1 Define Rule 2 Set Rule Activation

Nominee: **Select...**

Assign These Tasks: All

The nominee is the substitute for all tasks

I Want the Nominee to:

Receive My Tasks
You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule

Fill In For Me
If you are unexpectedly absent, the assignee can take over your tasks completely.

Next Cancel

- Specify when the rule should be activated (either immediately or select future dates for the substitution) and select Save button.

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the assignee receive your tasks (for example, when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you are unexpectedly absent).

1 Define Rule 2 Set Rule Activation

On saving, turn on the following rule::

- On - The rule will be enabled
 - At Once
 - On
- Off - The rule will not be enabled

You can turn the rule on or off at any time on the Substitution Rules Management screen.

Previous Save Cancel

- The new Substitution Rule now shows in your list of Rules. Select “Problems reported (repairable)” link to check this rule.

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	Turn On/Off
All	Gore, Melonie	Receives my tasks	Ongoing	Problems reported (repairable)	Turn Off

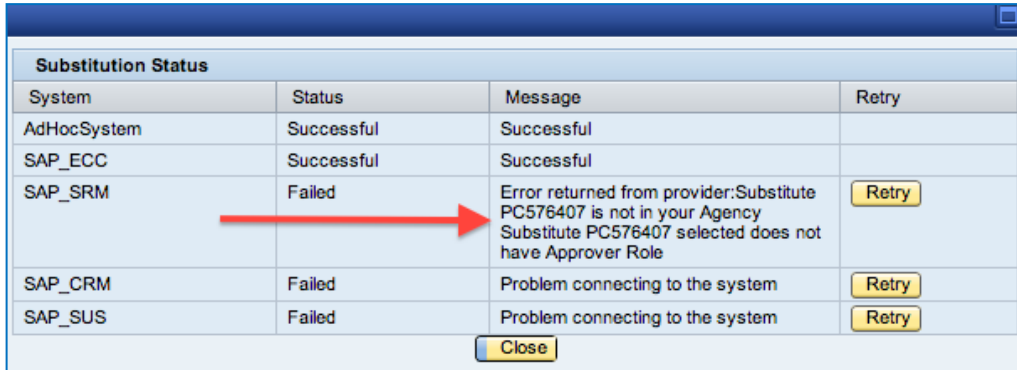
- Status of 'Successful' here means substitution is okay.

Substitution Status

System	Status	Message	Retry
AdHocSystem	Successful	Successful	
SAP_SRM	Successful	Successful	
SAP_ECC	Successful	Successful	
SAP_CRM	Failed	Problem connecting to the system	Retry
SAP_SUS	Failed	Problem connecting to the system	Retry

Close

Note: Only users who are within your Agency and have authorization to Approve can be added as substitutes. If they lack either of these criteria, you will see an associated message at this point and Status will show as Failed.



The image shows a dialog box titled "Substitution Status" with a table of system substitution results. A red arrow points to the "Failed" status of the SAP_SRM system. The table has four columns: System, Status, Message, and Retry. The rows are: AdHocSystem (Successful), SAP_ECC (Successful), SAP_SRM (Failed), SAP_CRM (Failed), and SAP_SUS (Failed). The SAP_SRM row's message is "Error returned from provider:Substitute PC576407 is not in your Agency Substitute PC576407 selected does not have Approver Role". Each failed row has a "Retry" button, and there is a "Close" button at the bottom.

System	Status	Message	Retry
AdHocSystem	Successful	Successful	
SAP_ECC	Successful	Successful	
SAP_SRM	Failed	Error returned from provider:Substitute PC576407 is not in your Agency Substitute PC576407 selected does not have Approver Role	Retry
SAP_CRM	Failed	Problem connecting to the system	Retry
SAP_SUS	Failed	Problem connecting to the system	Retry

Close

Ad hoc Approvers and Reviewers

Purpose:

Users not assigned by the system workflow can be added to provide Approval or to notify them to Review the document (reviewer action is not required for document to be ordered).

How do I get to Ad hoc Approvers and Reviewers?

1. From a Shopping Cart, select the “Display / Edit Agents” link near the top; this will launch a new window for adding Approvers or Reviewers.

Display Shopping Cart: 1000003051

Number 1000003051 Document Name RF332297 06/25/2014 11:00 Status Saved Created On 06/25/2014 11:00:49 Created By Robert Fulcher

[Edit](#) [Close](#) [Print Preview](#) [Create New Shopping Cart](#) [Refresh](#) [Copy](#)

▼ General Data

Buy on Behalf of:

Name of shopping cart:

Header Data: [Values](#)

Approval Process: [Display / Edit Agents](#) ←

Budget: [Display](#)

Records Management: [Display](#)

Document Changes: [Display](#)

Approval Note

2. From a Purchase Order, Rfx, or Contract, select the Approval tab.

Create Purchase Order [Help](#)

Purchase Order Number 4000002501 Purchase Order Type General PO Status In Process Document Date 06/25/2014 Total Value (Gross) 100.00 USD Smart Number Supplier [DELL MARKETING LP](#)

[Order](#) [Save](#) [Close](#) [Print Preview](#) [Check](#) [Export](#) [Import](#) [Park](#)

Overview Header Items Notes and Attachments **Approval** Tracking Supplier Ordering Address

Current Status: Header Approval Note

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header Item

Header Approval Status

[Add Approver](#) [Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On	Forwarded By	Work Item Type
001	SRM Purchase Order Approval	Open (No Decision Made)	PO Fiscal Approval	Susan Dodder				

Functionality:

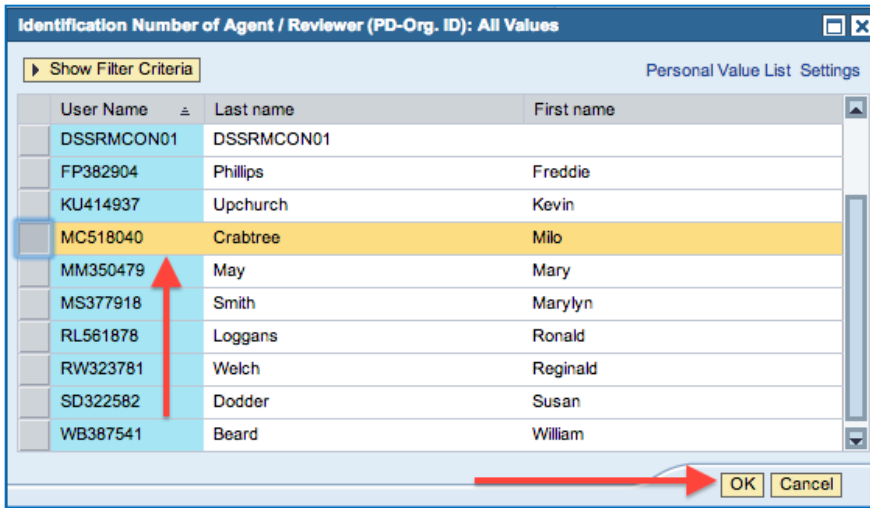
1. Select the Add Approver button, then option to add approver below or above the selected line.

The screenshot shows the 'Approval Process Overview' window. At the top, there are fields for 'Current Status' (Initial), 'Current Process Step', 'Currently Processed By', and 'Approval Process Data' (Download as XML). A 'Header Approval Note' field is also present. Below these is a 'Follow Up' section with a checkbox for 'Work Item to Requester at Process End'. The main area is divided into 'Header' and 'Item' tabs. The 'Header' tab is active, showing a table titled 'Header Approval Status'. The table has columns for 'Start Approval (1)', 'Status', 'Processor Determination', 'Processor', 'Received On', 'Processed On', 'Forwarded By', and 'Work Item Type'. A red arrow points to the 'Add Approver' button above the table. A dropdown menu is open, showing options: 'Add Approver Above Selected Line' and 'Add Approver Below Selected Line'. Below the table is a section titled 'Reviewer(s) for the Document' with an 'Add Reviewer' button and a table with columns for 'Reviewer Level', 'Reviewer Type', 'Processor', 'Received On', 'Processed On', and 'Forwarded By'. The table is currently empty, with a message: 'The table does not contain any data'. An 'OK' button is at the bottom right.

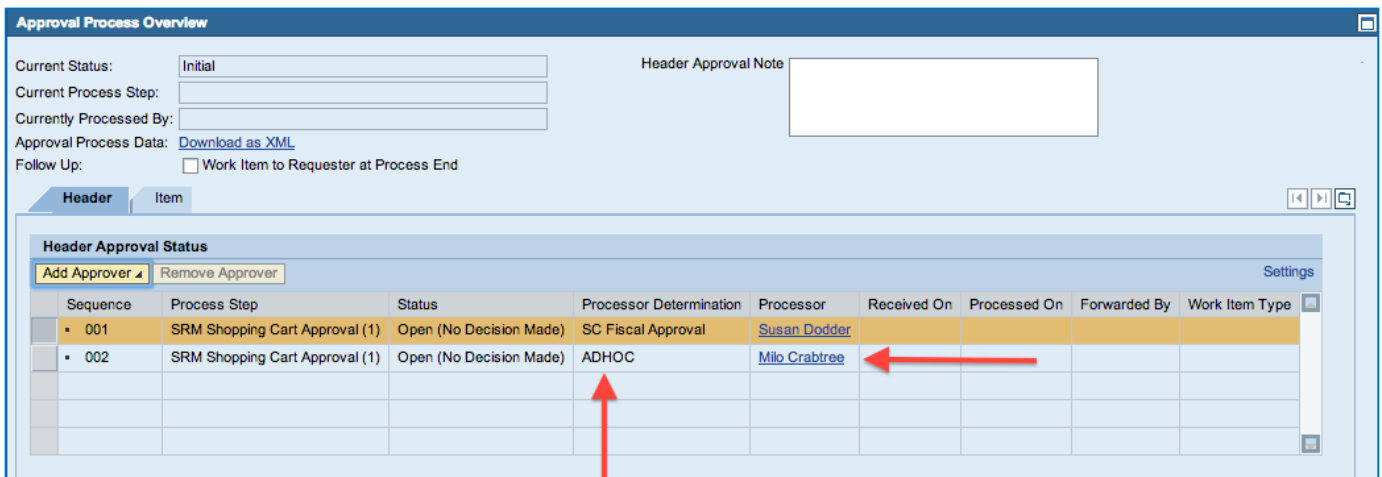
2. Select button to right of Approver ID field to select user to add as Approver.

The screenshot shows the 'Add Approver' dialog box. It has a title bar with 'Add Approver' and window control buttons. The main area contains several text input fields: 'Approver ID:', 'Name:', 'Department:', 'Building:', 'Telephone Number:', and 'E-Mail Address:'. A red arrow points to a small square button with a person icon located to the right of the 'Approver ID' field. At the bottom right, there are 'OK' and 'Cancel' buttons.

- Select the User you want to add and click ok. (Note: only users who have authorization to Approve documents for your Agency will be displayed in this list.)



- User is added as a new Approver for the order. (Note: Processor Determination displays as “ADHOC;”the Settings link on the right can add this field to the screen display if it is not displayed.)



5. Same steps can be used to Add Reviewer; just use Reviewer section at the bottom of the screen.

Approval Process Overview

Current Status: Header Approval Note:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header | **Item**

Header Approval Status

[Add Approver](#) | [Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On	Forwarded By	Work Item Type
001	SRM Shopping Cart Approval (1)	Open (No Decision Made)	SC Fiscal Approval	Susan Dodder				
002	SRM Shopping Cart Approval (1)	Open (No Decision Made)	ADHOC	Milo Crabtree				

Reviewer(s) for the Document

[Add Reviewer](#) | [Remove Reviewer](#) [Settings](#)

Reviewer Level	Reviewer Type	Processor	Received On	Processed On	Forwarded By
The table does not contain any data					

6. Ad hoc Approver/Reviewer can be removed if they are added incorrectly.

Approval Process Overview

Current Status: Header Approval Note:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Follow Up: Work Item to Requester at Process End

Header | **Item**

Header Approval Status

[Add Approver](#) | [Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On	Forwarded By	Work Item Type
001	SRM Shopping Cart Approval (1)	Open (No Decision Made)	SC Fiscal Approval	Susan Dodder				
002	SRM Shopping Cart Approval (1)	Open (No Decision Made)	ADHOC	Milo Crabtree				

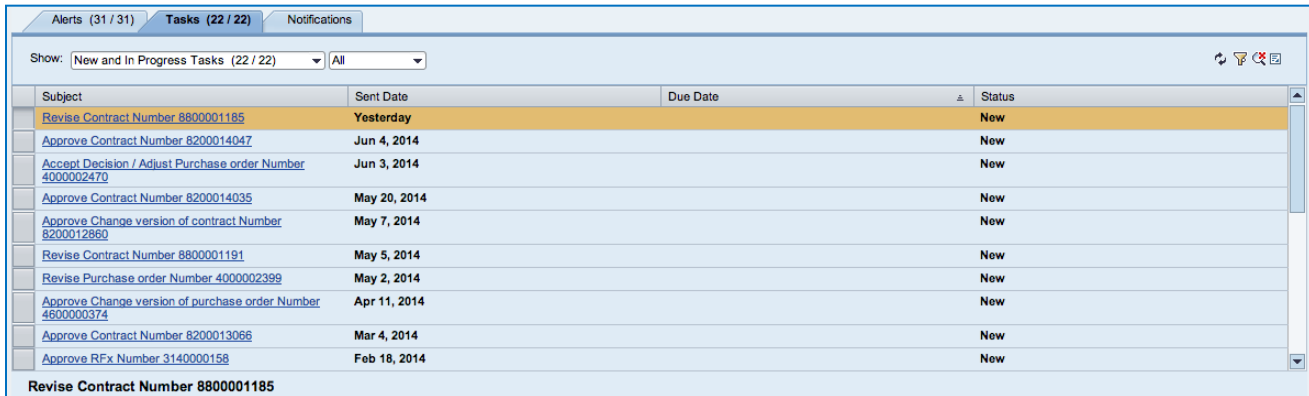
Workflow Settings

Purpose:

Users have the ability to modify some aspects of their inbox to fit their personal preferences. You can control which fields are displayed, how the items are sorted, and how many items are displayed. There are also options to filter and refresh your inbox and to display new or already completed items.

How do I get to Workflow Settings?

From your inbox:

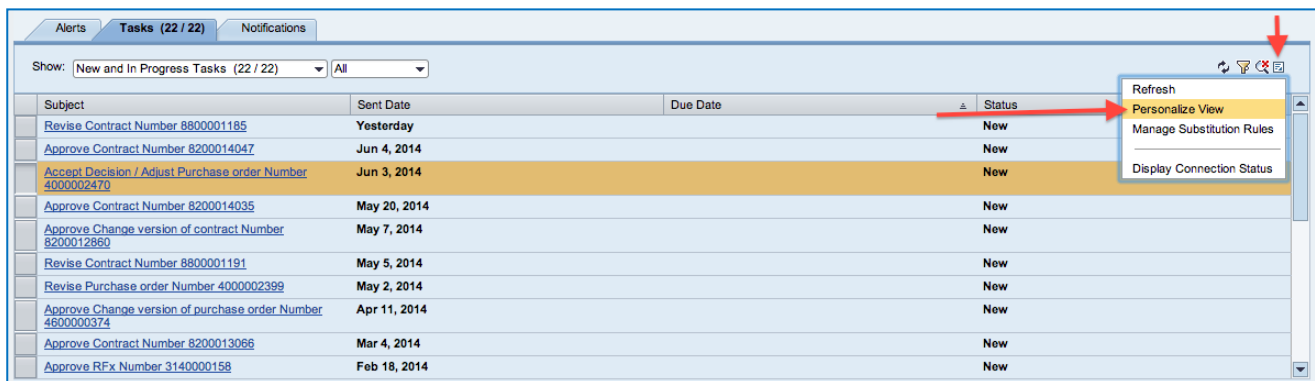


The screenshot shows an inbox interface with tabs for Alerts (31 / 31), Tasks (22 / 22), and Notifications. Below the tabs, there are filters for 'Show: New and In Progress Tasks (22 / 22)' and 'All'. The main content is a table with the following data:

Subject	Sent Date	Due Date	Status
Revise Contract Number 8800001185	Yesterday		New
Approve Contract Number 8200014047	Jun 4, 2014		New
Accept Decision / Adjust Purchase order Number 4000002470	Jun 3, 2014		New
Approve Contract Number 8200014035	May 20, 2014		New
Approve Change version of contract Number 8200012860	May 7, 2014		New
Revise Contract Number 8800001191	May 5, 2014		New
Revise Purchase order Number 4000002399	May 2, 2014		New
Approve Change version of purchase order Number 460000374	Apr 11, 2014		New
Approve Contract Number 8200013066	Mar 4, 2014		New
Approve RFx Number 3140000158	Feb 18, 2014		New

Functionality:

1. Select the button on the far right; then select Personalize View option.



- You can remove fields from your view, reorder them and add fields from the drop down list. You can also change the sorting criteria if you wish. Don't forget to Save your changes.

Personalize "Tasks"

Save Duplicate Restore Defaults Cancel

Attributes and their order
 In this section, you can define the attribute order and which attributes you want displayed. To change the display order, follow the example.

Current display attributes
 Subject Sent Date Due Date Status
 <Selected>

Remove From Current View >> Available Attributes not Displayed: Add

Properties of "Subject"

Horizontal Alignment: Left
 Width:

Sorting properties
 In this section, you can define the default setting for the sorting preference
 Items are sorted by:

Due Date Ascending Descending
 Sent Date Ascending Descending
 Ascending Descending

Content Area

- You can filter the items display in a couple of ways:

- You can use this drop down to show a few types of items, including ones that you previously Completed.

Alerts (32 / 32) Tasks (22 / 22) Notifications

Show: New and In Progress Tasks (22 / 22)

Subject	Sent Date	Due Date	Status
Tasks Forwarded to Someone	Yesterday		New
Tasks for Resubmission			New
Completed Tasks	Jun 4, 2014		New
Accept Decision / Adjust Purchase order Number 4000002470	Jun 3, 2014		New
Approve Contract Number 8200014035	May 20, 2014		New
Approve Change version of contract Number 8200012860	May 7, 2014		New
Revise Contract Number 8800001191	May 5, 2014		New
Revise Purchase order Number 4000002399	May 2, 2014		New
Approve Change version of purchase order Number 460000374	Apr 11, 2014		New
Approve Contract Number 8200013066	Mar 4, 2014		New
Approve RFX Number 3140000158	Feb 18, 2014		New

Revise Contract Number 8800001185

- You can also use the filter icon in the top right of the screen. Once you select the icon, you can use the drop-downs for the fields displayed to filter. For example, using Sent Date, you can show just the items from yesterday.

Alerts (31 / 31) Tasks (22 / 22) Notifications

Show: New and In Progress Tasks (22 / 22) All

Subject	Sent Date	Due Date	Status
Revise Contract Number 8800001185			New
Approve Contract Number 8200014047	Today		New
Accept Decision / Adjust Purchase order Number 4000002470	Yesterday		New
Approve Contract Number 8200014035	Last 7 Days		New
Approve Change version of contract Number 8200012860	Last 30 Days		New
Approve Change version of contract Number 8200012860	Last 90 Days		New
Revise Contract Number 8800001191	May 5, 2014		New
Revise Purchase order Number 4000002399	May 2, 2014		New
Approve Change version of purchase order Number 4600000374	Apr 11, 2014		New
Approve Contract Number 8200013066	Mar 4, 2014		New
Approve RFX Number 3140000158	Feb 18, 2014		New

Revise Contract Number 8800001185

- Or you can enter the number of a specific Contract you want to find.

Alerts (31 / 31) Tasks (22 / 22) Notifications

Show: New and In Progress Tasks (22 / 22) All

Subject	Sent Date	Due Date	Status
Approve Contract Number 8200013066	Mar 4, 2014		New