

# *'My Inbox'* User Guide



Rev. 4.2021

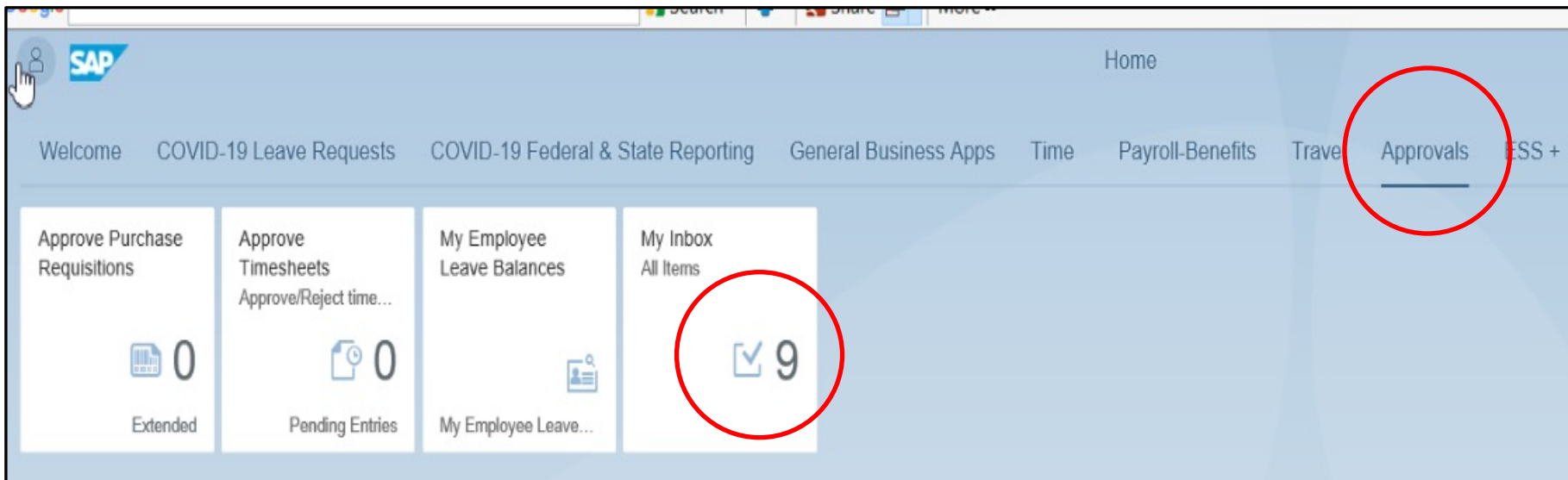
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# Getting Started

“My Inbox” is a mobile friendly SAP Portal application that will be used for all SAP workflow approvals. This application can be found on the [SAP Portal](#) in the “**Approvals**” section.



The count (9) identifies how many approval items you have.

# Quick Approvals (where approve & reject buttons are visible):

The screenshot displays the 'PCR Manager/Dept Approval' interface. On the left, a list of tasks is shown, with the task 'e-Pcr Mr John Matthew Stone - Special Payment (FPM) - ( Account Manager / Associate VP)' highlighted in a red box. The main area shows the details for this task, including the 'Texas State SAP Workflow System' and 'Status: Ready'. A 'Submit Decision' dialog box is open, showing the message 'You selected "Approve".' and a text input field for a decision note. At the bottom of the task detail view, the 'Approve' and 'Reject' buttons are highlighted in a red box.

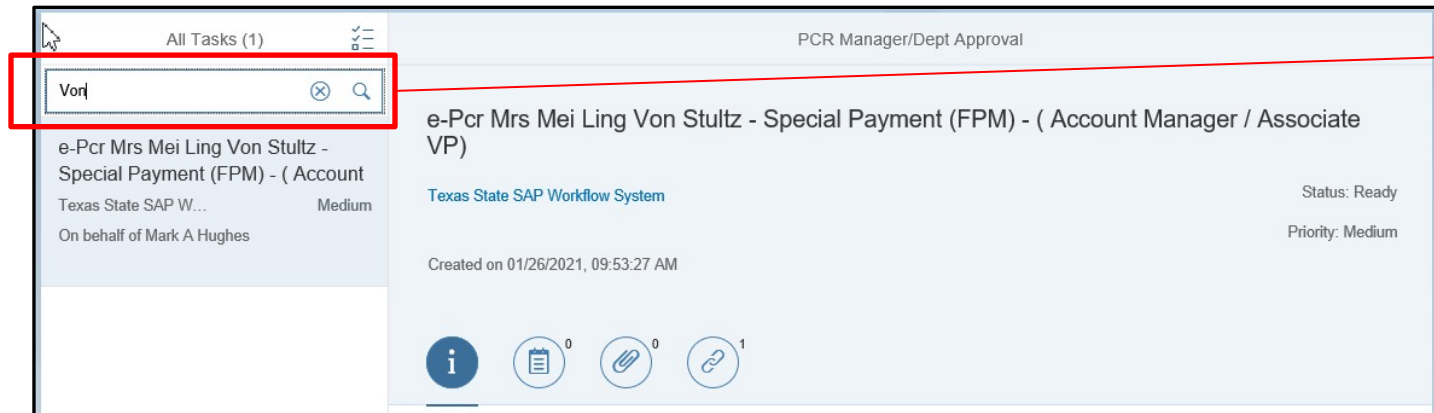
Pct	CostCtr	Order	WBS	Fund
100.00	1212130000			2000011021

1. Click on a task description in the leftmost column to choose an approval item to process.
2. Press **Approve** or **Reject** to process your approval decision.
3. A comment box will pop-up for providing a comment. Press Submit to log a comment.
4. To see more detail (like document attachments, etc), press "**Open Task**" to launch a detailed approval screen.

# Search, Filter, and Group Tasks

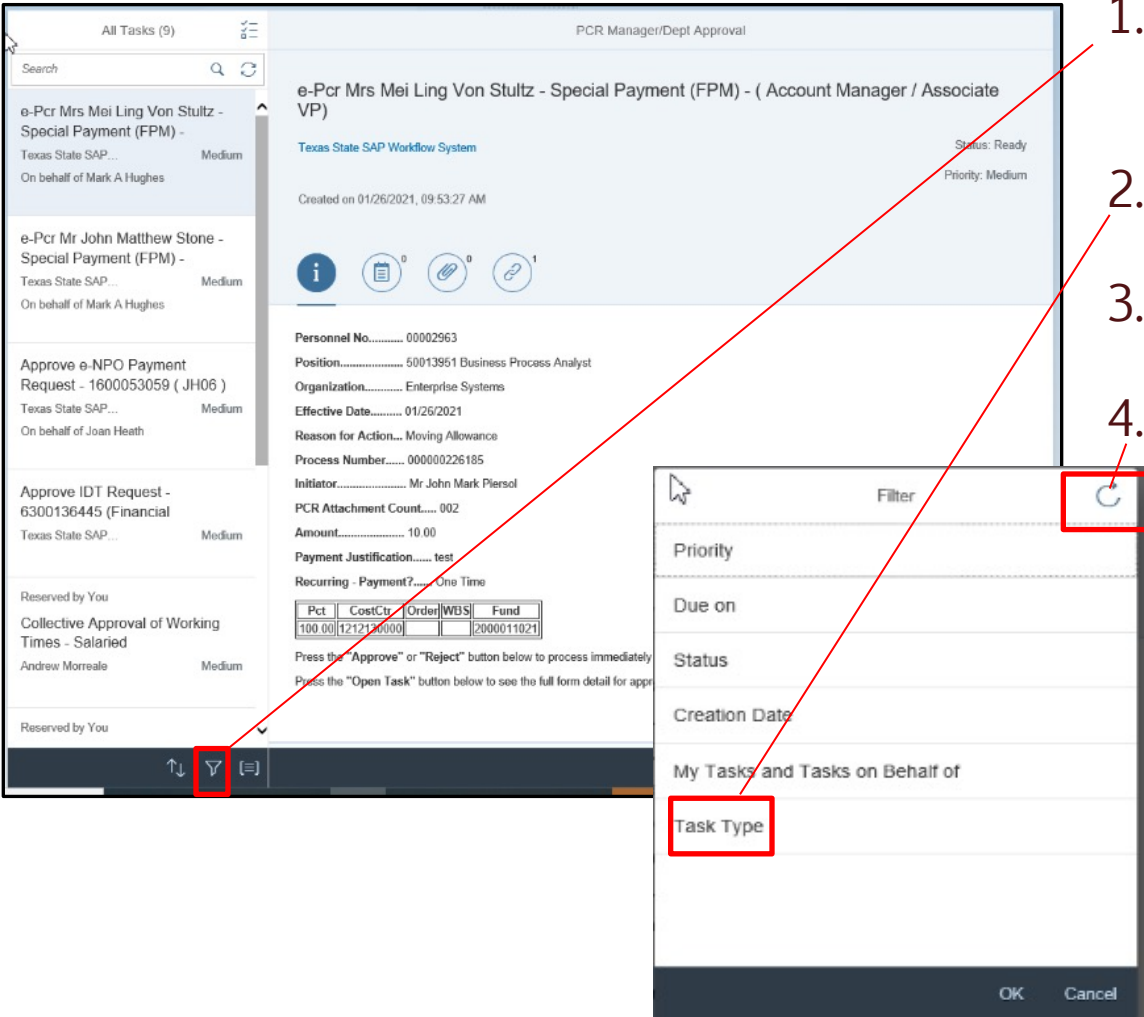
My Inbox provides options for organizing tasks that make it easier to find specific tasks to approve when needed.

## Search:



Enter text from a Task Description to search. Press “X” to clear search.

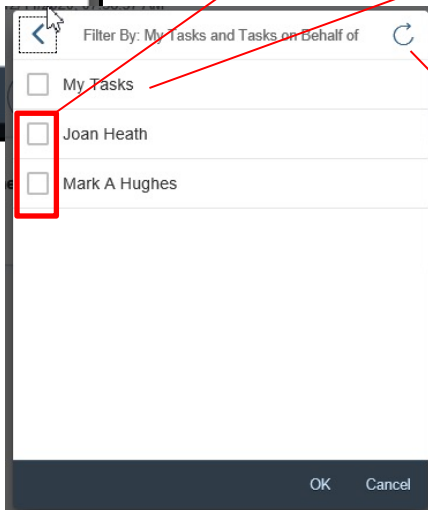
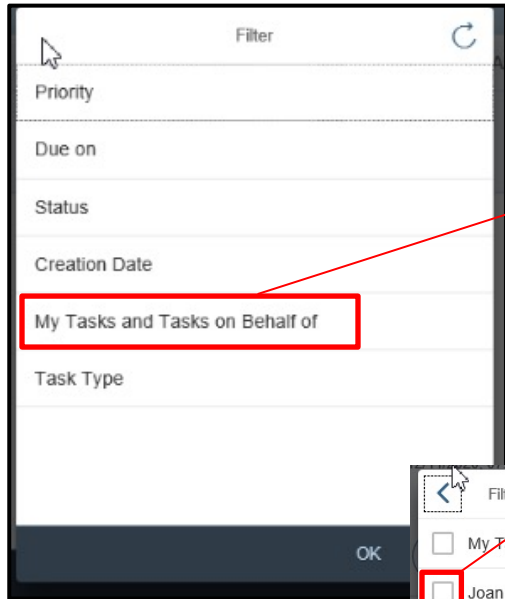
# Filter By *Task Type*:



1. Press the **Filter** button to bring up a filter option screen.
2. Choose task type filter and press ok.
3. Choose one or more task types and press ok.
4. Press the **Clear All Filters** button to remove the filter.

# Filter By *My Tasks & Tasks on Behalf Of*

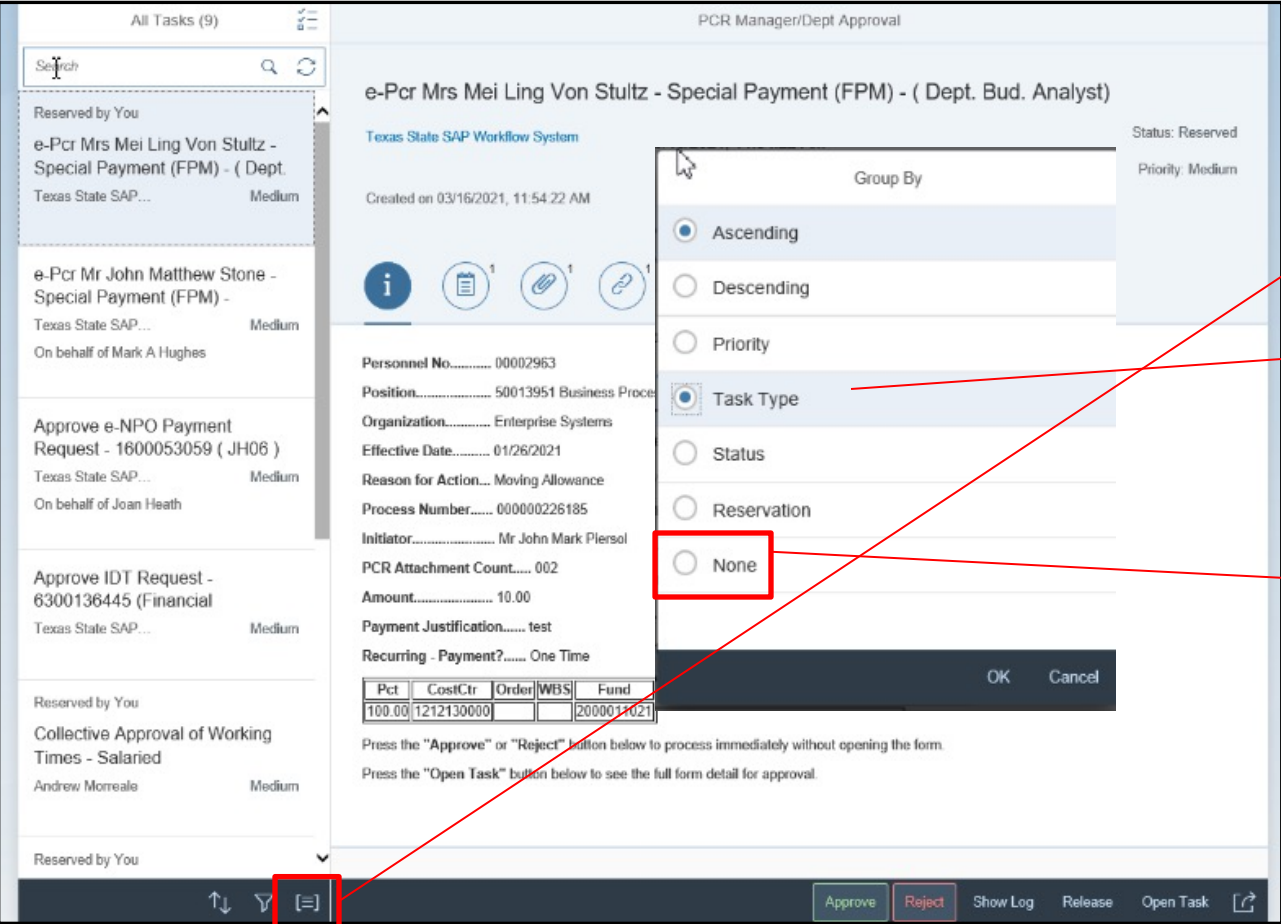
(For scenarios where you've been established as an approval substitute)



1. Using the filter options, choose *My Tasks and Tasks on behalf of*, and click ok.
2. Choose one or more people to see the tasks for which you are an approval substitute. Press OK.
3. Choose *My Tasks* to see ONLY your personal approval items.
4. Press the *Clear All Filters* button to remove the filter.

# Group

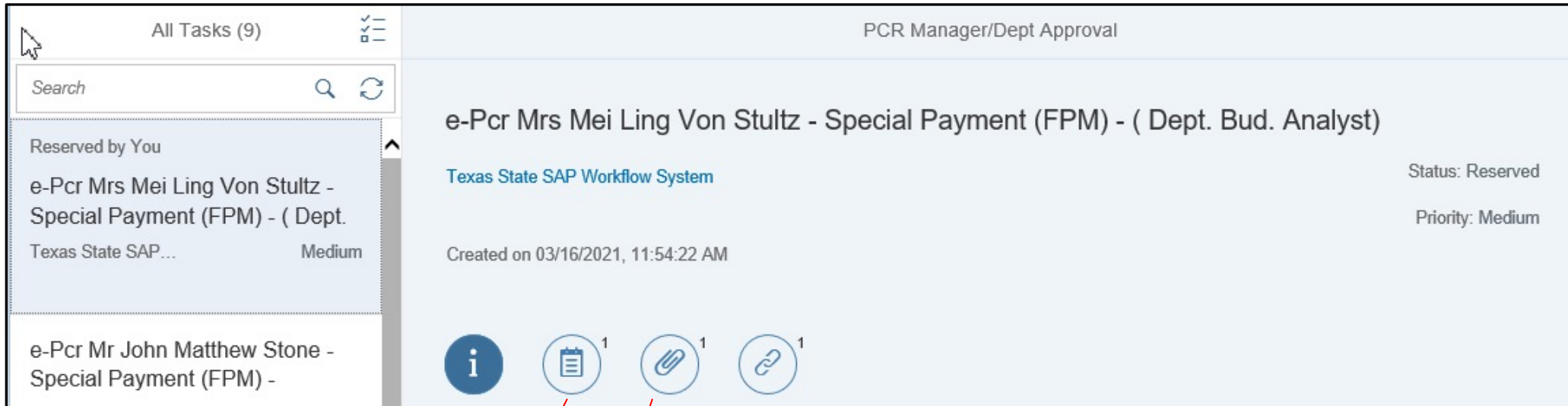
With Group, you can further arrange approval items



1. Press the **Group** button to bring up the 'Group By' option screen.
2. Choose a Group By item (i.e. **Task Type**) and press OK. This grouping will organize tasks by type (ie e-NPO,e-PCR, e-IDT, etc).
3. Choose **None** to stop grouping and press OK.



# Comments & Attachments



The screenshot displays a task management interface. On the left, a sidebar shows a list of tasks under the heading "All Tasks (9)". The selected task is "e-Pcr Mrs Mei Ling Von Stultz - Special Payment (FPM) - ( Dept. Bud. Analyst)" with a status of "Reserved" and a priority of "Medium". The main area shows the task details, including the system name "Texas State SAP Workflow System" and the creation date "Created on 03/16/2021, 11:54:22 AM". At the bottom of the task details, there are four icons: an information icon (i), a comments icon (notepad) with a "1" above it, an attachments icon (paperclip) with a "1" above it, and a link icon (chain) with a "1" above it. Red lines point from the first two instructions in the list below to the comments and attachments icons respectively.

1. Click on the **Comments** button to read what a prior approver noted when they completed an approval item using the “Approve” or “Reject” button and providing a comment.
2. Click on the **Attachments** button to add a supplemental attachment. You can also click to see what a prior approver has attached.

# Claim and Release Tasks

PCR HR/FR Admin Approval

Master Data Ctr (M1) - Mr Gabriel Gil - Special Payment (FPM)

Status: Ready  
Priority: Medium

Created on 03/12/2021, 10:08:26 AM

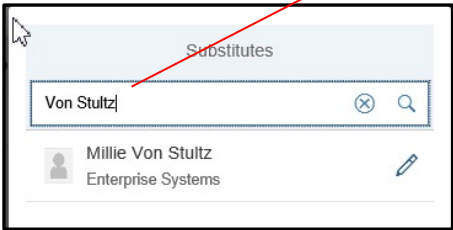
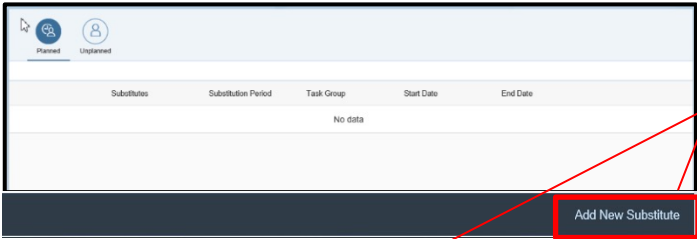
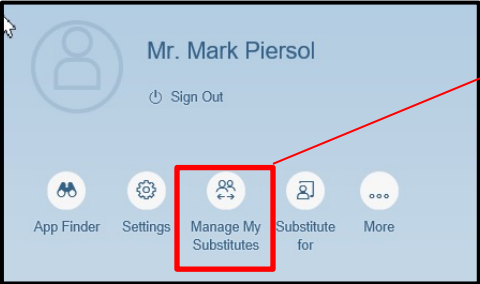
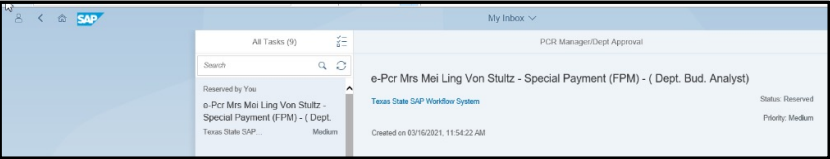
Approval Level..... Master Data Ctr (M1)  
Effective Date..... 03/09/2021  
Process Number..... 000000226279  
Personnel No..... 00001850  
Position..... 5000967 Sr Programmer Analyst  
Organization..... Mobile/Web Systems  
Job..... 50007599 Sr Programmer Analyst  
Payroll Area..... M1  
Pers Area / Subarea... Information Technology / BE FT (40)  
Empl Grp / Subgrp..... Staff / 12 Mo Ex Salaried  
Initiator..... Mr John Mark Piersol ( JP47 )  
Created On..... 03/09/2021 @ 09:52:22  
Account Manger..... Mr Mark A Hughes ( MH66 )  
Acct Mgr Position..... 50009657 Assoc.VP, Technology Resources  
Acct Mgr Org..... 50000054 Technology Resources Administration  
Acct Mgr Pers Area... 1200 Information Technology  
PCR Attachment Count..... 000


Show Log Claim Open Task

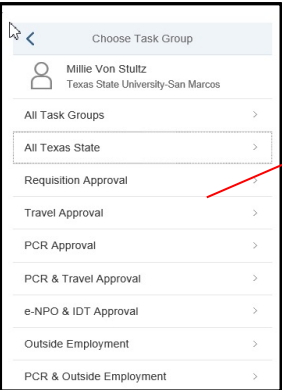
1. Press **Claim** to reserve a task for your processing only. Claiming is relevant in a group approval situation. Only you will see a claimed task. In addition, as an approval substitute, you can claim a task to remove task visibility from a primary approver.
2. After claiming a task, press **Release** if necessary to make a task visible again to the entire group (or primary approver).

Show Log Release Open Task

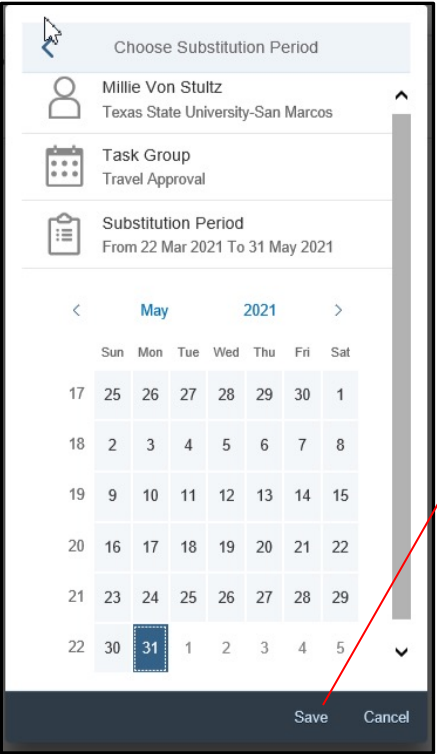
# Setting Up a Planned Approval Substitute



1. Go to My Inbox and click on the User Icon. 
2. Click on *Manage My Substitutes*.
3. Click on *Add New Substitute* the default substitute type is "Planned". A planned substitute is an ongoing substitute that always sees tasks in My Inbox as they become available.
4. Enter the name of the person (partial name) to establish as a substitute and click the search icon. Choose the desired name.
- 5.) Click to choose a Task Group for your new substitute (i.e. *Travel Approval*).



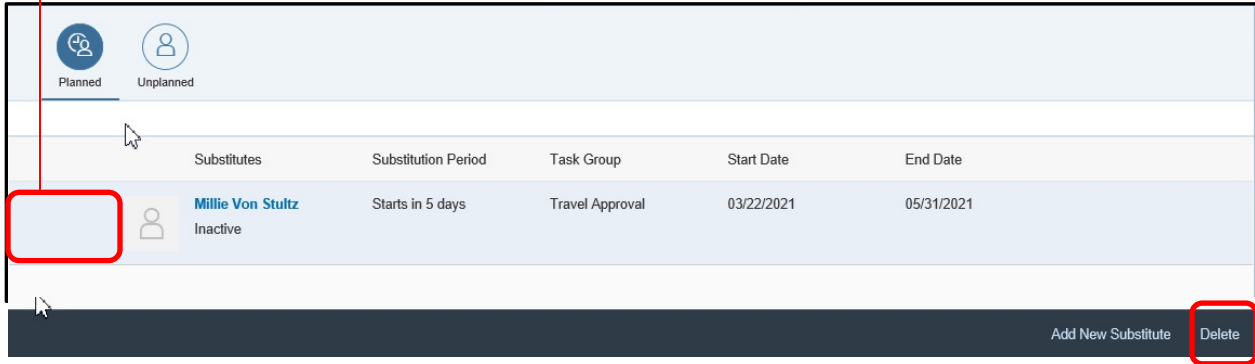
# Setting Up a Planned Approval Substitute (Continued)



6. The default start date is today. Adjust to a future start date using calendar (if necessary).

7. Choose an end date on the calendar if the substitution is temporary. Press Save.

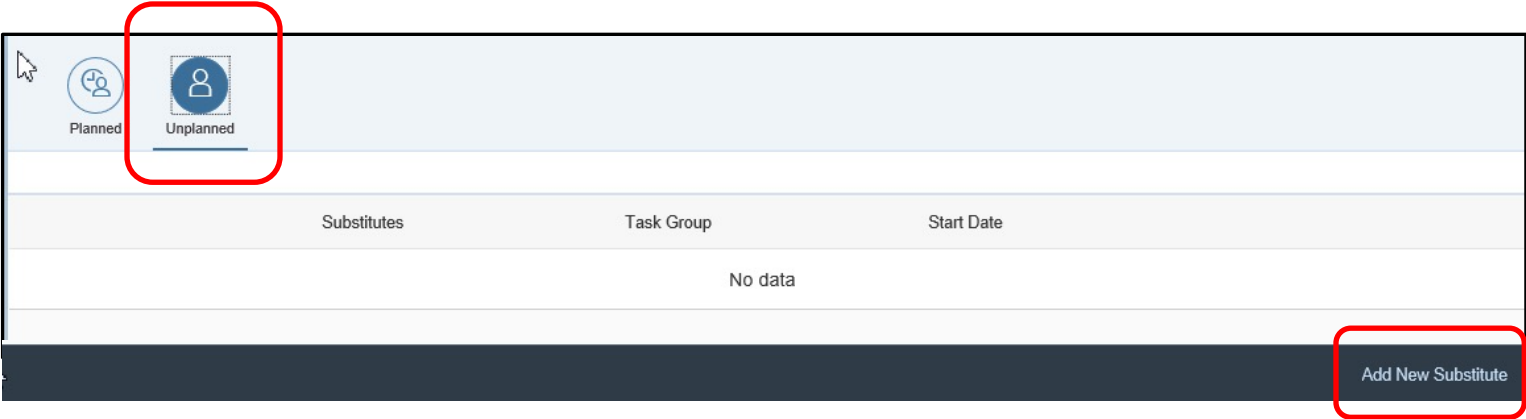
**Note:** Established substitutes cannot be edited but they can be deleted. To delete a substitute, click to the left of the name and press delete. Confirm deletion.



# Setting Up and Unplanned Approval Substitute

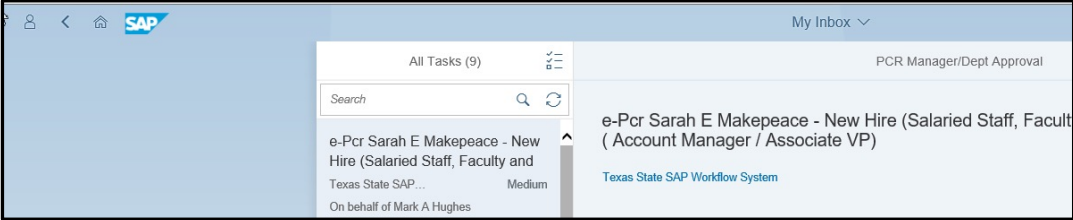
Unlike a Planned Approval Substitute, an unplanned substitute does not see any approval items unless they opt to receive tasks for each primary approver. The intention is for the unplanned substitute to take over this duty periodically as needed.

Follow the same initial steps listed under "Setting up a Planned Approval Substitute" (pg. 10) except this time, chose *Unplanned* and press *Add new substitute*.

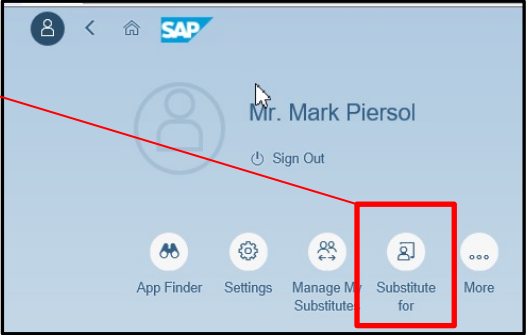


# Receiving Tasks as an Unplanned Approval Substitute

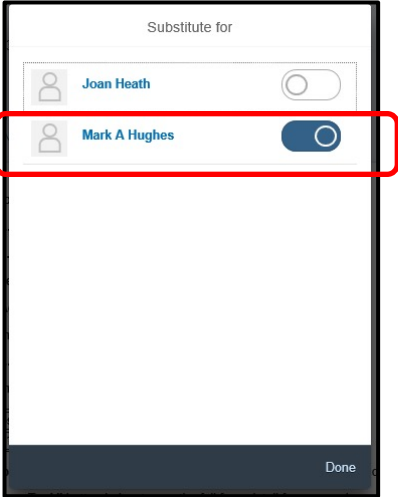
1. Go to My Inbox and click on the user icon. 



2. Click on *Substitute for*.



3. Choose one or more primary approvers to receive tasks for by sliding switch to the right.



4. Slide the switch back to the left when you are finished receiving tasks.

