How to Use Worklist Substitutions

Sourcing & Procurement
Worklist Substitutions

Shoppers and Approvers planning time out of the office can assign tasks in BUworks to other individuals with Substitution.*

- Click ‘Worklist’ Tab
- Click ‘Manager Substitution’

Step 1. Click Worklist Tab

Step 2. Click Manager Substitution

*Substitution allows you to schedule coverage ahead of time, and enables your worklist to be managed by others while you are out.
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Step 5. Type Substitute’s Name

Step 6. Click Search

Step 7. Select Substitute

Step 8. Click Apply

- Type substitutes name (Last name, First name)
- Click ‘Search’
- Select Substitute
- Click ‘Apply’

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- Click ‘Next’
- Schedule when Substitution will take effect and end.
- Click ‘Save’

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.

Step 11. Schedule Rule

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.

Final Step. Click Save

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- Click ‘Save’
- ❖ Click ‘Turn Off/On’ to turn Substitution role off and on as needed
- ❖ Click ‘Delete’ to delete substitution roles no longer needed

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