Note: A substitute you set only has access to worklist items that generate AFTER the day you set the substitution. Requests made on a date prior to setting up a substitute must be forwarded or reviewed directly by the individual whose worklist the items reside in. Instructions for setting up a substitute are given below. For forwarding instructions, please go to the end of the document.

Step 1: Login to BUworks and click on the Worklist tab to review requests waiting for your approval/rejection.

Step 2: If your worklist has one or more requests waiting to be approved, you will find the Manager Substitution button located under the worklist items. Click on it.

Step 3: If your worklist is empty, the Manager Substitution button may be greyed out. In this case, click on the notepad drop down located to the farthest right corner, under the Refresh button. Choose to click on Manage Substitution Rules.

Step 4: You will need to first define the substitution rule and then activate it. Click on Create Rule.
Step 5: Type the name of the person you want to substitute in your absence. When a pop-up box appears asking you to confirm your choice of nominee, click on Apply. Choose one among the two options: **Receive my tasks** (If you are going to be out for a specific period of time such as a vacation) or **Fill in For Me** (This is to setup a permanent substitute who can take over tasks if you are unexpectedly absent).

Click on **NEXT** button.

Step 6: In this step, you activate the rule and save it. You can specify the rule to take effect at once or on a future date. For the substitution to begin on a specific date in the future, choose **ON** and use the calendar tool on the right side of the date box to choose a specific date when the substitution will begin.
Now, click on **Save**. Your substitution settings are now saved. You may close the window and exit the screen.

Step 7: The designated substitute will need to activate substitution by logging into BUworks, clicking on Worklist, Manage Substitution Rules and on “Take Over” button as shown below.
Step 8: The Substitution setup is now complete. The manager and the substitute can both review requests through their worklists. The request disappears from both worklists once either the task owner or the substitute acts upon the request.

Step 9: A manager can choose to turn off substitution by going to Manage Substitutions and clicking on the Turn On button. This button behaves as a toggle and can move between Turn On and Turn Off states. A manager may choose to turn off the substitution temporarily and then turn it back on, should there be a need to do so.

Step 10: At any time, a manager may also completely delete a substitution rule by clicking on the Delete button shown below. This removes the substitution permanently.

Step 11: For forwarding an item on your worklist, highlight the item and click on Forward button located under the worklist.

Step 12: Enter the name of the recipient and click on Submit button. This action forwards the worklist item to employee Judy Jones.