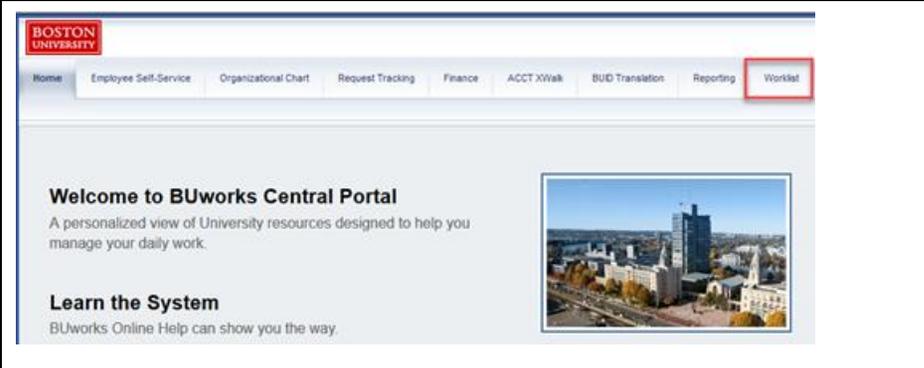
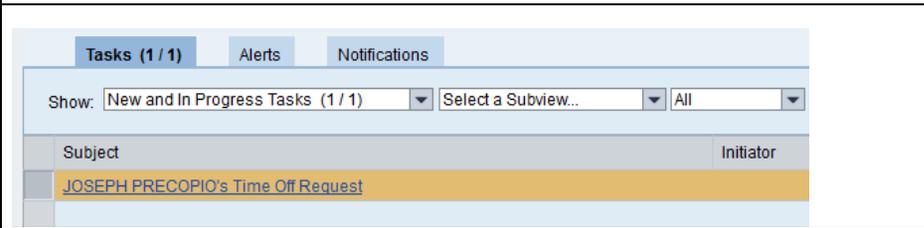
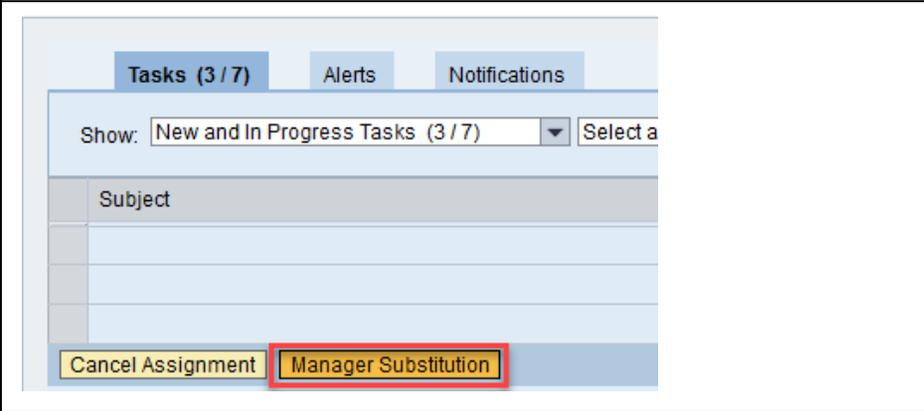
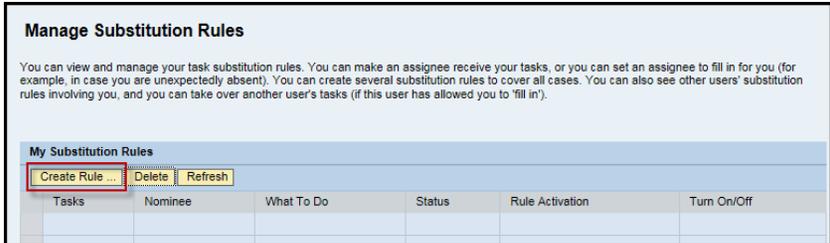
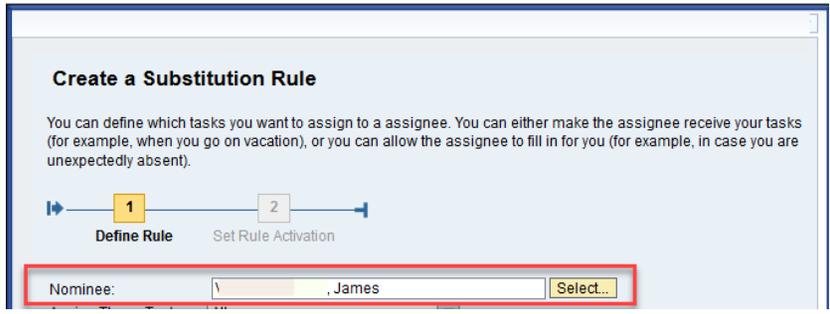


## Setting Up a Substitute to Approve Worklist Items–Quick Reference Guide

The worklist serves as the central entry point for the processing of Human Capital Management (HCM), Finance (FI) and Shopping cart (SRM) related tasks that need approval. Managers can setup an employee as a substitute to approve tasks in their absence either for a limited period of time or on a more permanent basis to fill in for them during an unexpected absence. Please note that the substitute only has access to worklist items a day after they have been setup as a substitute.

	<ol style="list-style-type: none"> <li>1. Log on to <b>BUworks Central</b> <a href="https://ppo.buw.bu.edu">https://ppo.buw.bu.edu</a></li> <li>2. Click on the <b>Worklist</b> tab</li> </ol>
	<ol style="list-style-type: none"> <li>3. If you have tasks waiting for approval, they will be displayed in the tasks tab in the worklist. Click on a <b>displayed task link</b> to open it</li> </ol> <p><b>NOTE:</b> If a worklist is empty, it means that no tasks are currently waiting for approval.</p>
	<ol style="list-style-type: none"> <li>4. To assign another employee in your department to act as a substitute, click on <b>Manager Substitution</b></li> </ol>

## Setting Up a Substitute to Approve Worklist Items—Quick Reference Guide

 <p><b>Manage Substitution Rules</b></p> <p>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).</p> <p><b>My Substitution Rules</b></p> <p>Create Rule ... Delete Refresh</p> <table border="1"> <thead> <tr> <th>Tasks</th> <th>Nominee</th> <th>What To Do</th> <th>Status</th> <th>Rule Activation</th> <th>Turn On/Off</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off							<p>5. Click on <b>Create Rule</b>. The <b>Create a Substitution Rule</b> section will be displayed</p>
Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off								
 <p><b>Create a Substitution Rule</b></p> <p>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).</p> <p>1 Define Rule → 2 Set Rule Activation</p> <p>Nominee: [text box] , James [Select...]</p>	<p>6. Enter <b>User name or ID for nominee</b>. If you need to search for a user, click on <b>Select</b></p>												

## Setting Up a Substitute to Approve Worklist Items–Quick Reference Guide

7. Type user name into the Text Field “**Search for Names**”
8. Click on **Search**
9. Click on **User’s name**
10. Click on **Apply**

11. There are two types of substitutes you can setup:
  - A. For your nominee to serve as your substitute *at all times*, click on “**Receive My Tasks**”
  - B. For your nominee to serve as your substitute *for a limited time*, click on the “**Fill in For Me**” option. This option requires an additional step to be performed by the nominee in **Worklist tab** to start receiving and seeing tasks. Click on **Next**

## Setting Up a Substitute to Approve Worklist Items–Quick Reference Guide

**Create a Substitution Rule**

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

1 Define Rule      2 Set Rule Activation

On saving, turn the rule::

- On - The rule will be enabled
- At Once
- 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

12. Select the radio button to specify if the rule is enabled
- At Once or
  - On a specific date

Click on **Save** to save the 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

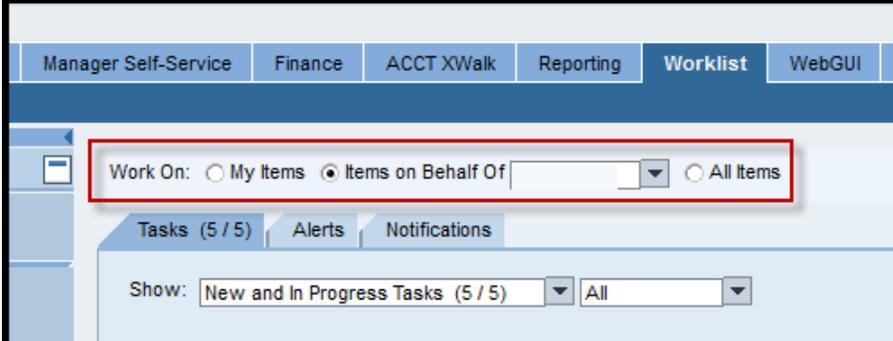
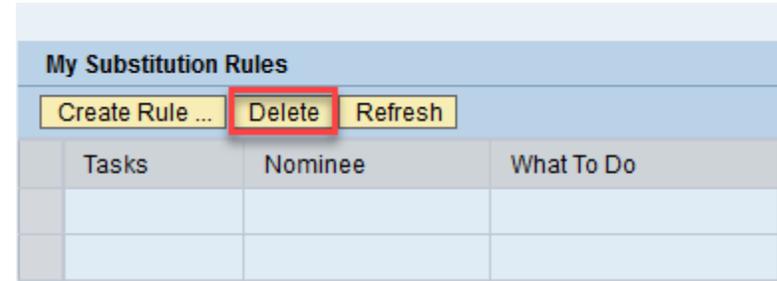
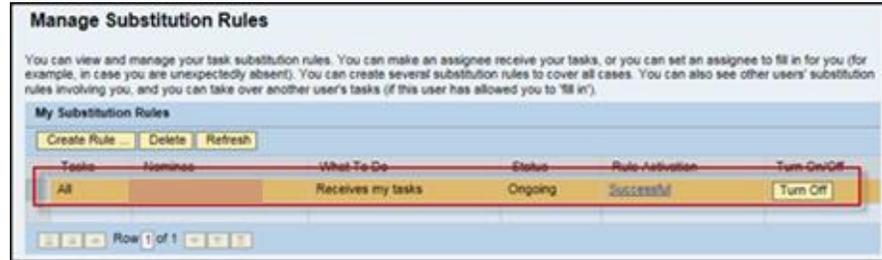
Create Rule ... Delete Refresh

Task Owner	Tasks	What To Do	Status	Take Over
	All	Fill In	Ongoing	Take over

Row 1 of 1

13. The assigned nominee will need to go into Manager Substitution from worklist tab and click on **Take Over**

## Setting Up a Substitute to Approve Worklist Items–Quick Reference Guide

	<p>14. The nominee will need to select the radio button “<b>Items on Behalf of</b>” to see the tasks on behalf of the assigner</p>
	<p>15. After activation of substitution, a manager has the option of completely deleting a substitution rule</p> <p>Click on <b>Manager Substitution</b></p> <p>Select an existing substitution rule by clicking on it</p> <p>Click on <b>Delete</b></p>
	<p>16. A manager can also cancel the substitution by going into <b>Manager Substitution</b> and clicking on <b>Turn Off</b></p> <p>The substitution can be turned on at a later point in time if needed</p>