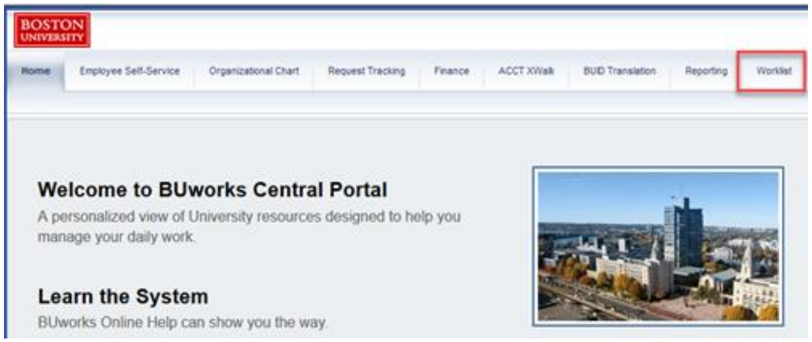
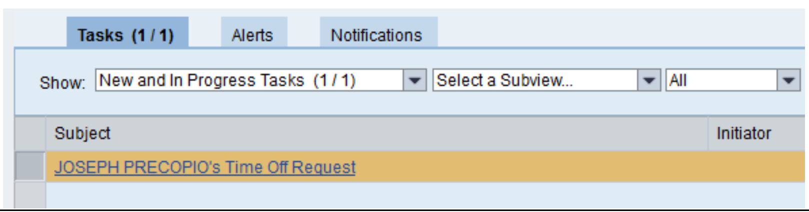
Setting Up a Substitute to Approve Worklist Items–Quick Reference Guide

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.



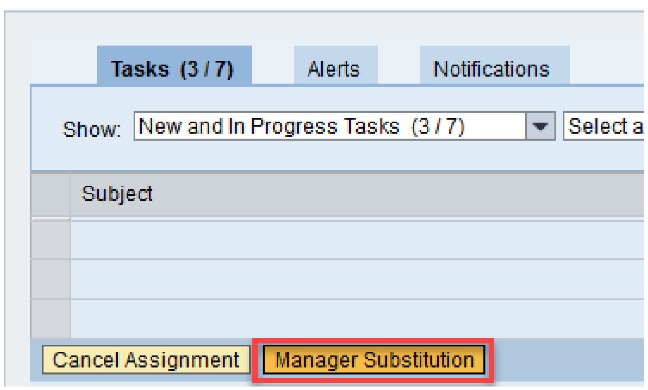
1. Log on to **BUworks Central** https://ppo.buw.bu.edu

2. Click on the **Worklist** tab



3. If you have tasks waiting for approval, they will be displayed in the tasks tab in the worklist. Click on a **displayed task link** to open it

NOTE: If a worklist is empty, it means that no tasks are currently waiting for approval.



4. To assign another employee in your department to act as a substitute, click on **Manager Substitution**

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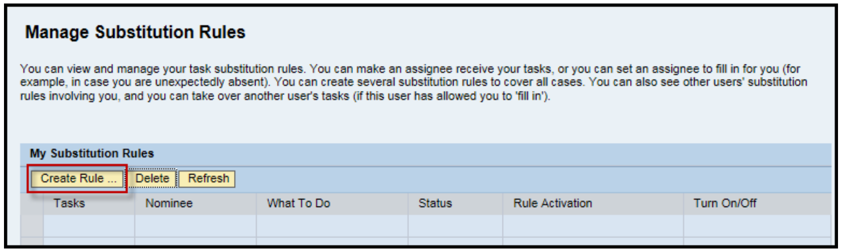
<td>
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<td>5. Click on Create Rule. The Create a Substitution Rule section will be displayed</td>
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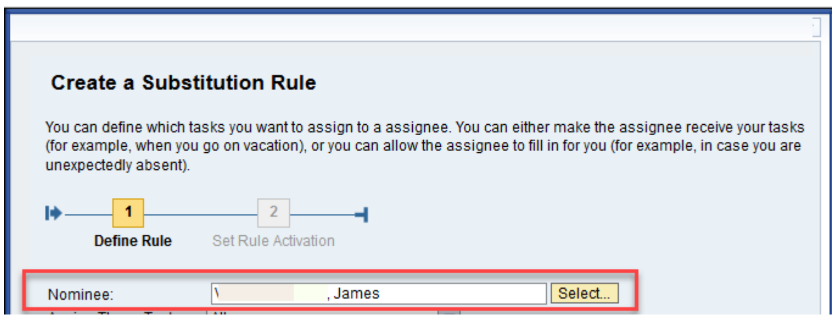
<td>
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<td>6. Enter User name or ID for nominee. If you need to search for a user, click on Select</td>
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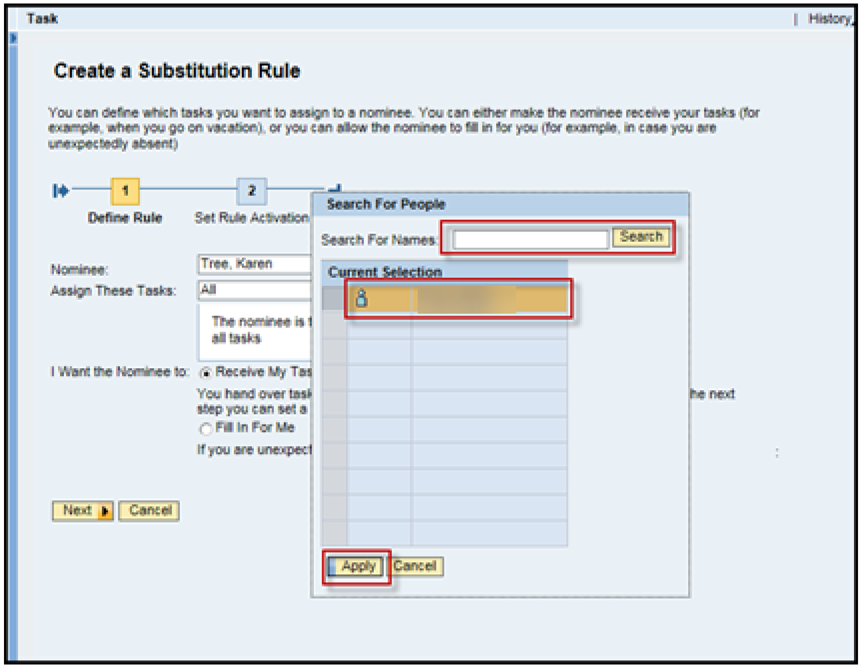
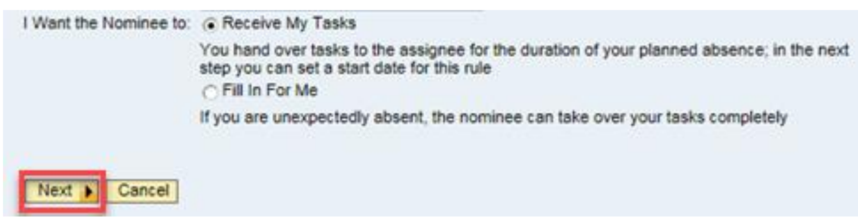


7. Type user name into the Text Field "**Search for Names**"

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**

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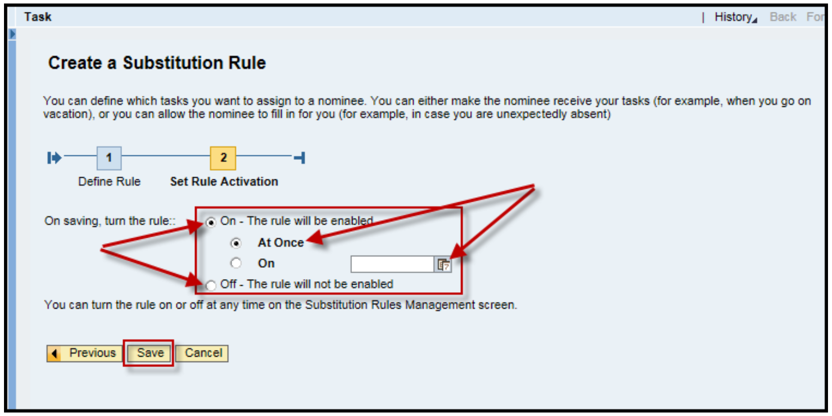

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12. Select the radio button to specify if the rule is enabled
- At Once or
- On a specific date

Click on Save to save the rule
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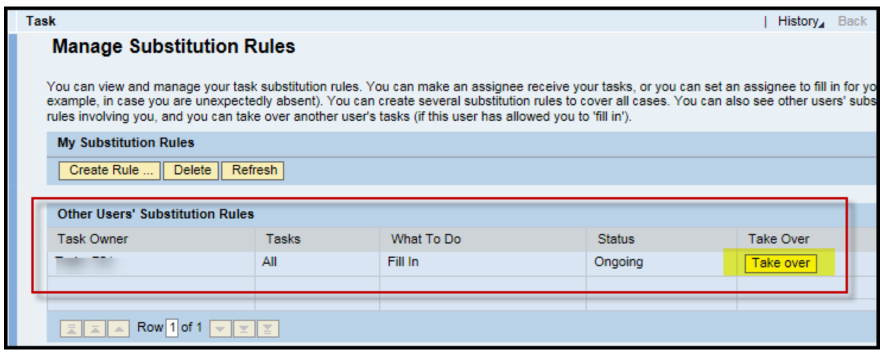
<td>


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<td>
13. The assigned nominee will need to go into Manager Substitution from worklist tab and click on Take Over
</td>
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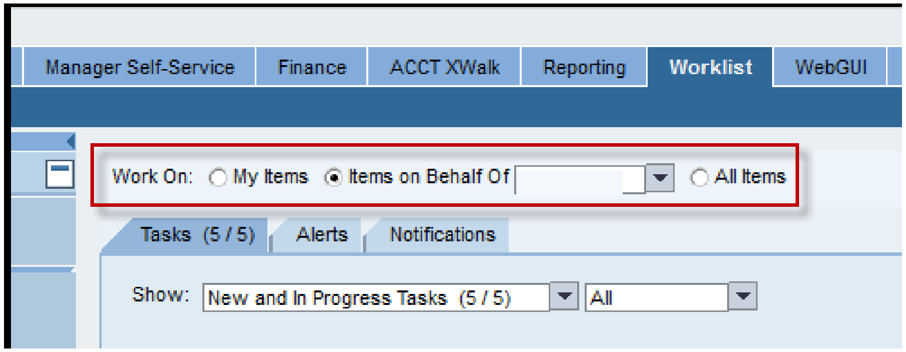
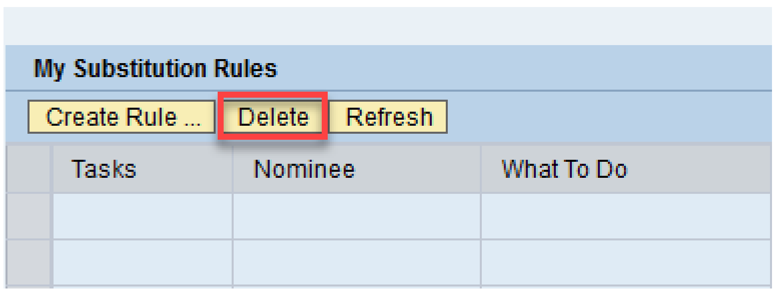
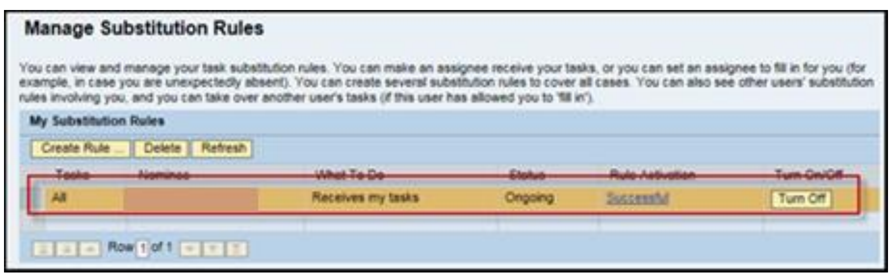
	14. The nominee will need to select the radio button "**Items on Behalf of**" to see the tasks on behalf of the assigner
	15. After activation of substitution, a manager has the option of completely deleting a substitution rule Click on **Manager Substitution** Select an existing substitution rule by clicking on it Click on **Delete**
	16. A manager can also cancel the substitution by going into Manager Substitution and clicking on **Turn Off** The substitution can be turned on at a later point in time if needed