BOSTON UNIVERSITY

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.

Weise Employee Self.Service Organizational Chart Request Tracking Prance ACCT XWalt BUD Translation Reporting Worklat Weise Weise Reporting Worklat Weise Weise Weise Weise Weise Weise Weise Weise Weise ACCT XWalt BUD Translation Reporting Weise	 Log on to BUworks Central <u>https://ppo.buw.bu.edu</u> Click on the Worklist tab
Tasks (1 / 1) Alerts Notifications Show: New and In Progress Tasks (1 / 1) Select a Subview All Subject Initiator JOSEPH PRECOPIO's Time Off Request	 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.
Tasks (3 / 7) Alerts Notifications Show: New and In Progress Tasks (3 / 7) Select a Subject	4. To assign another employee in your department to act as a substitute, click on Manager Substitution



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').					assignee to fill in for you (for so see other users' substitution		5. Click on Create Rule. The Create a Substitution Rule section will be displayed
My Substitution R	ules						
Create Rule	Delete Refresh						
Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off		
							6. Enter User name or ID for nominee . If you need to search for a user, click on Select
Create a	a Substitutior	n Rule					
You can defin (for example unexpectedly	ne which tasks you ; , when you go on va y absent).	want to assign to a as acation), or you can all	signee. You c ow the assign	an either make the ass lee to fill in for you (for e	ignee receive your tasks xample, in case you are		
Define Rule Set Rule Activation							
Nominee:	1	, James		Select			



Task History	7. Type user name into the Text Field "Search for Names"
Create a Substitution Rule	8. Click on Search
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).	9. Click on User's name
Image: Set Rule Activation Search For People Nominee: Tree, Karen Assign These Tasks: All Il tasks The nominee is all tasks I Want the Nominee to: Receive My Task Fill in For Me Fill in For Me If you are unexpect If you are unexpect I want the Nominee to: Receive My Task I want the Nominee to: Receive My Task I goup can set a If all tasks I hour a unexpect If you are unexpect I goup cancel If you are unexpect	10. Click on Apply
I Want the Nominee to: Receive My Tasks You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule O Fill In For Me If you are unexpectedly absent, the nominee can take over your tasks completely	11. There are two types of substitutes you can setup:A. For your nominee to serve as your substitute <i>at all times</i>, click on "Receive My Tasks"
Cancel	B. For your nominee to serve as your substitute <i>for a limited time</i> , 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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	Create a Substitution Rule					- On a specific date
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	Define Rule Set Rule Activation					Click on Save to save the rule
	On saving, turn the rule:	once	led International Internationa			
	You can turn the rule on or off at any time or	n the Substitution R	ules Management screen.			
	Previous Save Cancel					
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Manager Self-Service Finance ACCT XWalk Reporting Worklist WebG Work On: My Items Items on Behalf Of All Items Tasks (5 / 5) Alerts Notifications Show: New and In Progress Tasks (5 / 5) All	14. The nominee will need to select the radio button " Items on Behalf of " to see the tasks on behalf of the assigner
My Substitution Rules Create Rule Delete Refresh Tasks Nominee What To Do Image: Colspan="2">Image: Create Rule Tasks Nominee What To Do	 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
Manage Substitution Rules You can view and manage your task substitution nules. You can make an assignee receive your tasks, or you can set an assignee to fill in for your anaple, 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 Tools Nomines West To Do Betwee Rule Assisted Turn GruCh All Reterives my tasks Origoing Successful Turn GruCh	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