

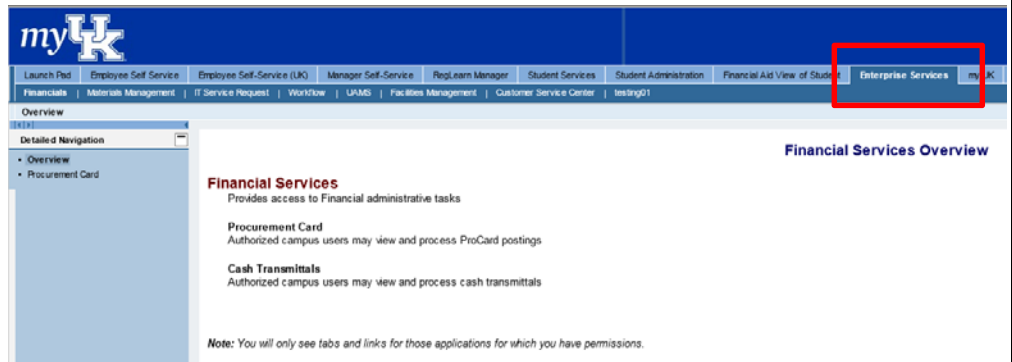
TRIP UWL Substitution Rule

Process: To review existing substitution rules and add a substitution rule at the Supervisor and Budget Officer levels for Trip.

PROCEDURES

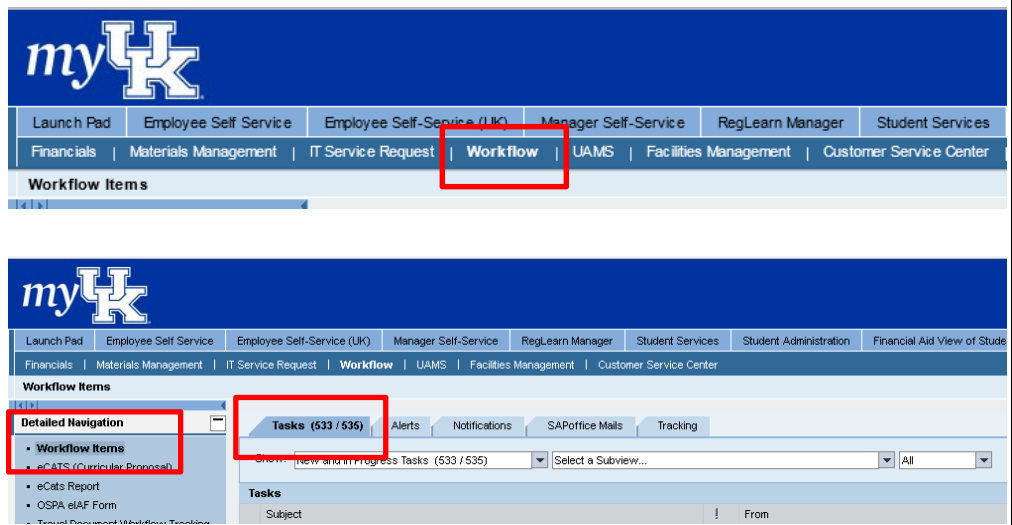
To review existing UWL substitution rules and add a new substitution rule for Trip, sign into myUK.

Click on Enterprise Services.



Click on Workflow.

The screen should open to the Navigation Workflow Items and the Tasks tab.




TRIP UWL Substitution Rule

On the right hand side of the Tasks tab, there is a series of small icons.

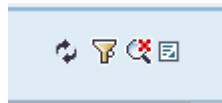
These icons are:


Refresh = 

Filter = 

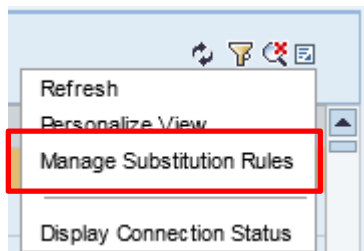
Preview Display = 

Menu Options = 



To review your substitution rules, click on the Menu Options icon .

From the dropdown menu list, click on Manage Substitution Rules.



TRIP UWL Substitution Rule

The Manage Substitution Rules feature will display the substitution menu.

My Substitution Rules will display all existing rules you have established for your work items.

Other Users' Substitution Rules will display all work items currently delegated to you as a substitute for another employee.

Manage Substitution Rules

You can view and manage your team 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](#)

Tasks	Notifyees	What To Do	Status	Rule Activation	Turn ON/OFF

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over
Rich, Marlene	Travel	Receive	Ongoing	
Newcomb, Sarah	All	Receive	Ongoing	

TRIP UWL Substitution Rule

To add a new Substitution Rule, click on Create Rule.

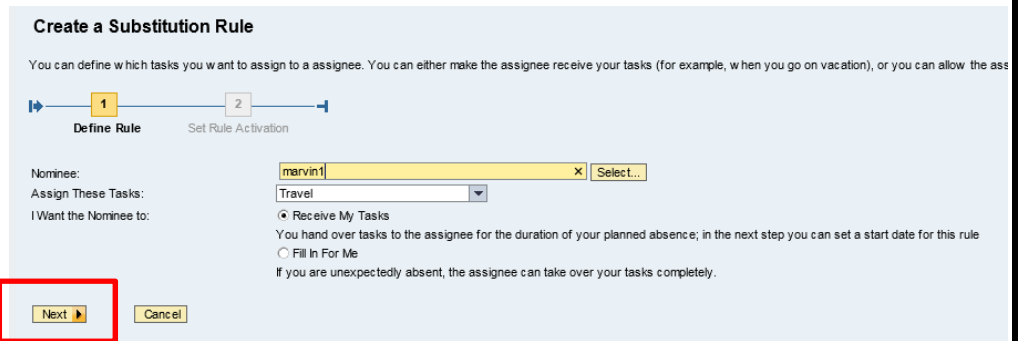
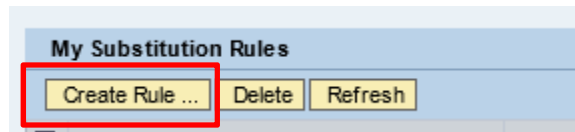
To define the rule, you must fill in the following fields:

Nominee: Enter the substitute's SAP User ID.

Assign These Tasks: Use the drop down menu to select Travel.

I Want the Nominee to: Choose the appropriate radial button.

Click Next.



NOTE: All Travelers are required to approve their own travel documents. A substitute should not approve a travel document as a substitute for the traveler.

TRIP UWL Substitution Rule

Choose the appropriate radial button to select the start date of the substitution rule.

Click Save.

The substitution rule has now been added under My Substitution Rules.

At any time the substitution rule is no longer valid or needed, return to My Substitution Rules and click Turn Off to end the substitution.

Create a Substitution Rule

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

1 Define Rule 2 Set Rule Activation

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.

Previous Save Cancel

My Substitution Rules

Create Rule... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
Travel	Rick, Melanie	Receives my tasks	Ongoing	Problems reported	Turn On/Off