Quick Reference Card – TRIP

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At any time the substitution rule is no longer valid or needed, return to My Substitution Rules and click Turn Off to end the substitution.