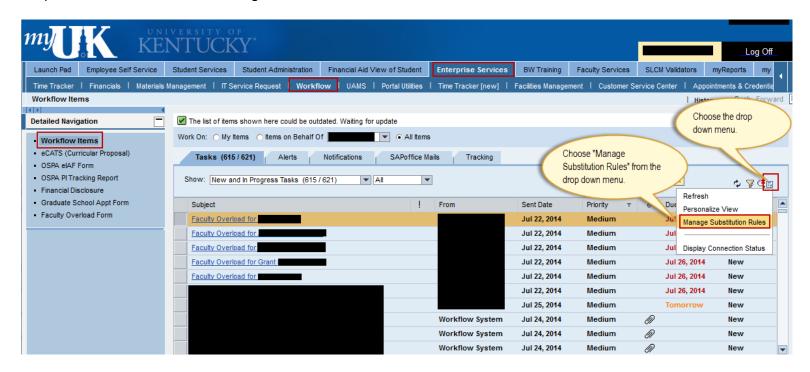# Creating Substitutions with the Faculty Overload Form

For assistance with this application, please contact the Office for Faculty Advancement at 859-323-6589.
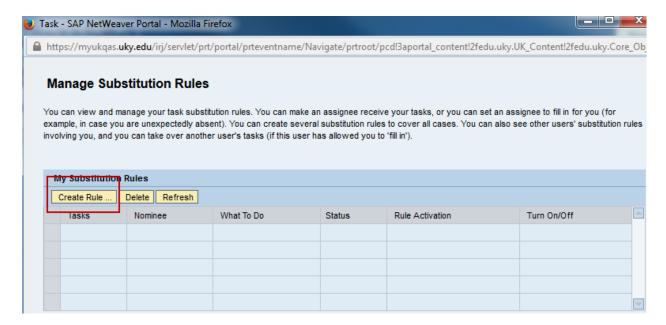
"Workflow Items" can be accessed via the myUK portal (at the link below) using Microsoft Internet Explorer or Mozilla Firefox.

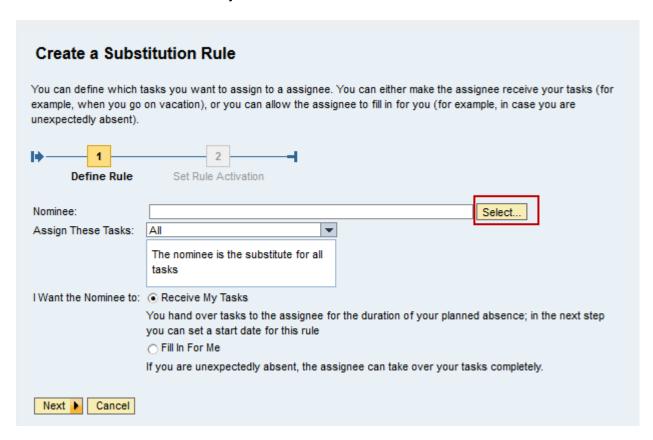https://myuk.uky.edu/irj/portal

Navigate to workflow items by clicking the "Enterprise Services" tab then the "Workflow" tab then the "Workflow Items" link and finally the drop down menu on the top right hand side of your Inbox. From the drop down menu, choose "Manage Substitution Rules".
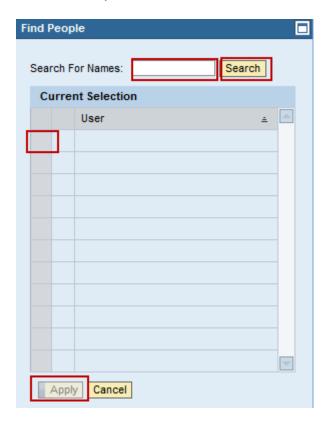

A pop up box will appear. Choose Create Rule.

Choose "Select" to search for your substitute.

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 the assignee to fill in for you (for example, in case you are unexpectedly absent).

```
⇥————[ 1 ]————————( 2 )————⊣
       Define Rule        Set Rule Activation
```

Nominee: [Select...]

Assign These Tasks: [All   ▼]

                       The nominee is the substitute for all
                       tasks

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
                       ○ Fill In For Me
                       If you are unexpectedly absent, the assignee can take over your tasks completely.
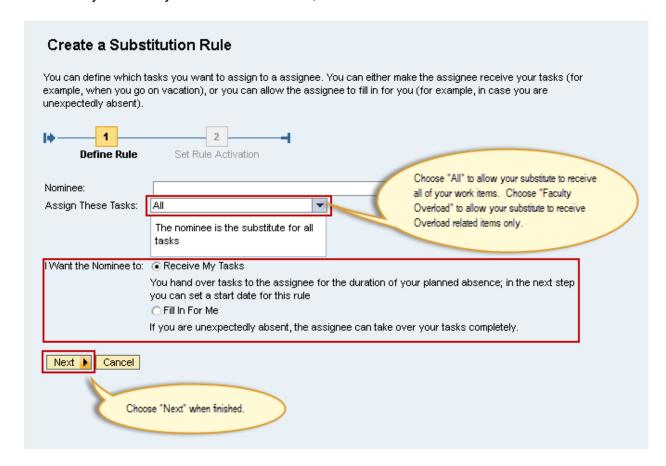
[Next ▶] [Cancel]

A popup box will appear. Search for your substitute by entering the substitute's last name in "Search for Names" then choose Search. A list of names will appear under "Current Selection". Choose the push pen to the left of your substitutes name then choose Apply.

Find People   ⊟

Search For Names: [   ] [Search]

Current Selection

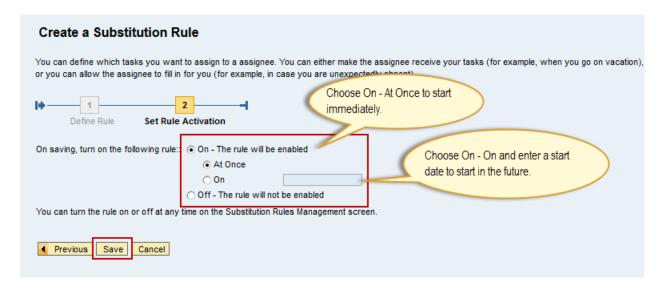|	User	≜

[Apply] [Cancel]

If you would like to allow your substitute to receive work items related to Faculty Overload only, choose "Faculty Overload" from the "Assign These Tasks:" drop down box. Choose "All" to allow the substitute to receive all your work items.

If the substitute should receive your task, choose the "Receive My Task" radio button. If the substitute only fills in for you when you are not available, choose the "Fill In For Me" radio button. Then choose Next.

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 the assignee to fill in for you (for example, in case you are unexpectedly absent).

1	2
Define Rule	Set Rule Activation

Nominee: _____

Assign These Tasks: All ▼

The nominee is the substitute for all tasks

Choose "All" to allow your substitute to receive all of your work items. Choose "Faculty Overload" to allow your substitute to receive Overload related items only.

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

○ Fill In For Me

If you are unexpectedly absent, the assignee can take over your tasks completely.

[Next ▶] [Cancel]

Choose "Next" when finished.

Take the default settings to turn the substitute on immediately. You can set a start date by choosing On and entering a start date. Choose Save.

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 the assignee to fill in for you (for example, in case you are unexpectedly absent).

1	2
Define Rule	**Set Rule Activation**

Choose On - At Once to start immediately.

On saving, turn on the following rule:: ◉ On - The rule will be enabled

   ◉ At Once

   ○ On _____

Choose On - On and enter a start date to start in the future.

○ 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]

Your new substitute will appear under "My Substitution Rules".

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

	Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off	
	All	███████████	Receives my tasks	Ongoing	Successful	Turn Off	

After you close the window, your substitute should be able to see and approve the tasks in your inbox on your behalf.