

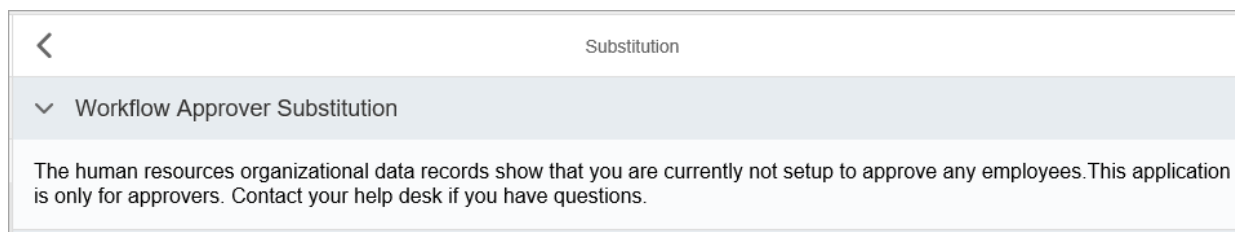
Workflow Approver Substitution

Updated: June 7, 2017

The workflow approver substitution process allows approvers to create, edit and delete substitute approvers. In most cases, this will eliminate the need for approvers to contact their Human Resources Office to arrange for a substitute approver.

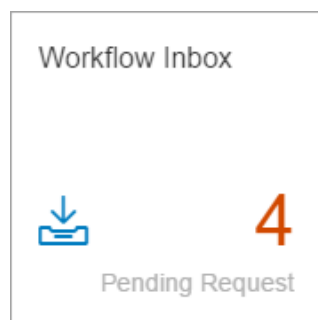
Specific Functionality

- The original approver does not receive any approval e-mail notifications generated during the designated substitution time frame, nor does he/she receive any workflow inbox items.
- The originating approver's workflow inbox during the substitution period will continue to show existing requests; the substitute approver will only see new approval requests during the active period specified.
- In the event an approver requiring a substitution rule to be defined is not available to perform the task on their own, we will revert to current practice of asking the HR Organizational staff. In this case a temporary change to position.
- Workflow logs will show the substitute approver as the agent for the period they are active.
- Upon termination of substitution rule, the substitute approver will still be responsible for any outstanding approvals that were received during the period the original approver was away. This includes any escalations and reminders that may be underway.
- Only the substitute approver will receive approval e-mail notifications and sees items in their workflow inbox.
- Once the period of approval substitution has expired or explicitly cancelled by the originating approver, the substitute approver will still be able to approve pending approval items within email notifications or within the workflow inbox.
- When workflow deadline escalations are reached, the substitution rules will be honored; for example, the escalation will be routed to the superior of the substitute.
- Employees will be able to see who is approving their requests within the leave, time and travel and expense applications.
- Because the Workflow Substitution button is visible for every Firefly user, if a user tries to create a substitute without the appropriate approver security, he/she will receive the following message:

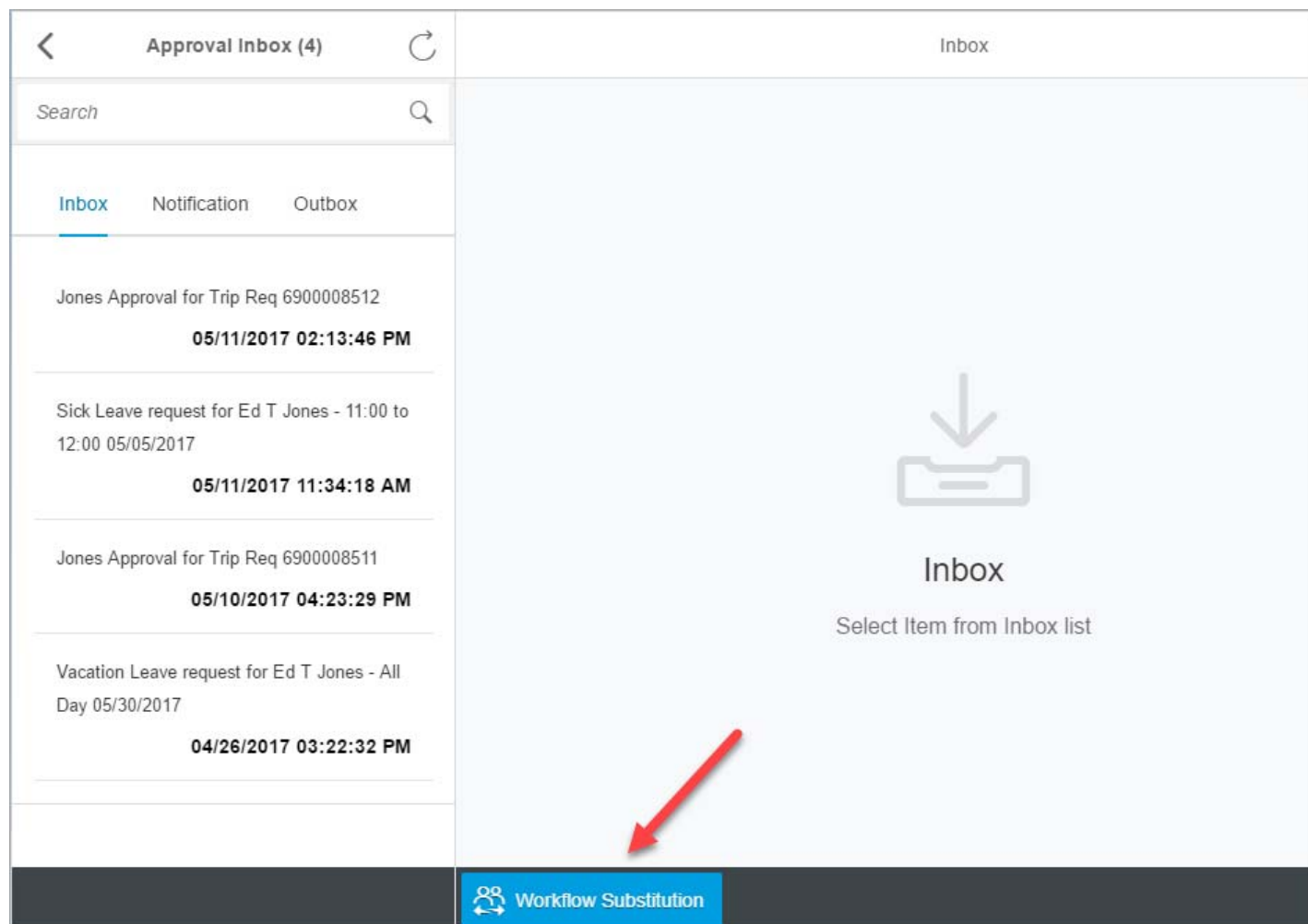


Assigning a Workflow Substitution

Click on the Workflow Inbox tile.



Click on  **Workflow Substitution**.



Approval Inbox (4)

Search

Inbox Notification Outbox

Jones Approval for Trip Req 6900008512
05/11/2017 02:13:46 PM


Sick Leave request for Ed T Jones - 11:00 to 12:00 05/05/2017
05/11/2017 11:34:18 AM

Jones Approval for Trip Req 6900008511
05/10/2017 04:23:29 PM

Vacation Leave request for Ed T Jones - All Day 05/30/2017
04/26/2017 03:22:32 PM

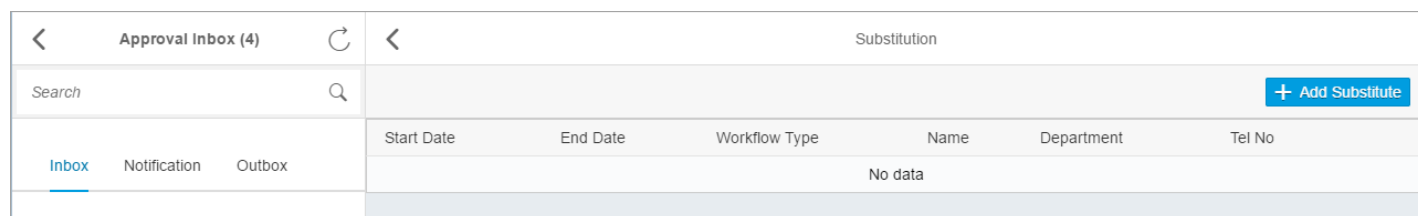
Inbox

Select Item from Inbox list

 **Workflow Substitution**

Any workflow substitutions already created will be listed on this screen.

Click on  **Add Substitute**.




Approval Inbox (4)


Search

Inbox Notification Outbox

Substitution

 **Add Substitute**

Start Date	End Date	Workflow Type	Name	Department	Tel No
No data					

Search for an approver by typing in the name and hit enter or press the .

You can cancel out of adding a substitute at any time by clicking on **Cancel**.

Search Name for Substitutes

No data

Cancel

Click on the desired approver name.

Search Name for Substitutes


Steven R Taege
Dept: University Services Business Center UNL
Tel No: 000-000-0000

Tedde Taege
Dept: CSN
Tel No: 402-472-7544

Cancel

Select the type of substitute approval.

< **Select Workflow Task**

 **Tedde Taege**

Dept: CSN

Email: TTAEGE@NEBRASKA.EDU

Tel No: 402-472-7544


Selection

- Travel and Expense Approvals >
- Leave Requests >**
- Time Approval >
- All Workflow Types >

Cancel

Enter the Start Date for when the substitute will begin receiving requests.

< **Select Start Date**

 **Tedde Taege**

Dept: CSN

Email: TTAEGE@NEBRASKA.EDU

Tel No: 402-472-7544

Workflow type: Leave Requests

Start Date:

< **Jun 2017** >


MON	TUE	WED	THU	FRI	SAT	SUN
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Cancel

Select the date the requests will revert back to original approver. Once you select an end date, the **Save** button will appear.

- The end date cannot extend for more than 6 weeks from the start date.
- If a future, begin date is specified workflow requests to the substitute approver will become effective on that date. (Note: A future, begin date cannot be more than 180 days in the future.)
- Once the end date is reached, all approval requests automatically revert back to the original approver.

Select End Date

 **Tedde Taege**

Dept: CSN

Email: TTAEGE@NEBRASKA.EDU

Tel No: 402-472-7544

Workflow type: Leave Requests

Start Date: 06/26/2017

End Date: 06/30/2017

Jun 2017

MON	TUE	WED	THU	FRI	SAT	SUN
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Save **Cancel**



Click on **Save**.



A success message will appear. Click on **Ok**.

Message

Successfully added

Ok

The Substitution is now listed. You can edit () or delete () the substitution as needed.

Substitution						
Start Date	End Date	Workflow Type	Name	Department	Tel No	
06/26/2017	06/30/2017	Leave Requests	Tedde Taege	CSN	402-472-7544	 

[+ Add Substitute](#)