Nottinghamshire County Council

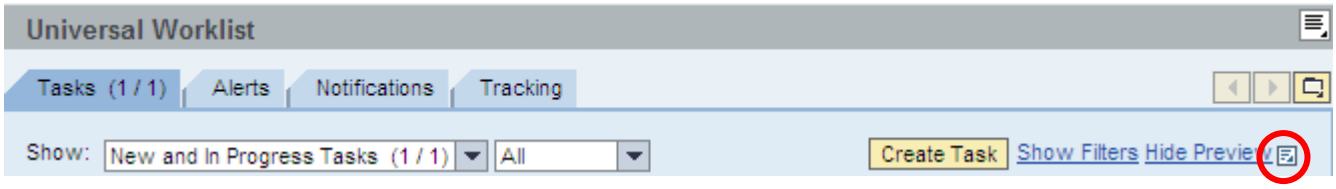
Creating “Receive My Tasks” Substitutions to handle Invoice Work Items

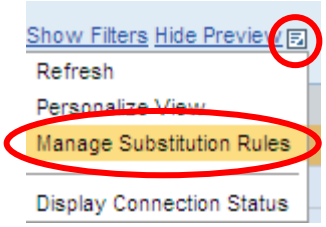
By creating a substitution you are nominating a colleague who will be able to process your invoice work items in your absence. A ‘**Receive My Tasks**’ substitution must be created and turned on at all times so that another team member can process your tasks in case of unplanned absences or to cover team workloads. For Invoice work items, the nominated team member (s) **must** have the same BMS roles in order for them to process the items.

A ‘**Fill in For Me**’ substitution will not give you the necessary permissions to process an invoice work item.

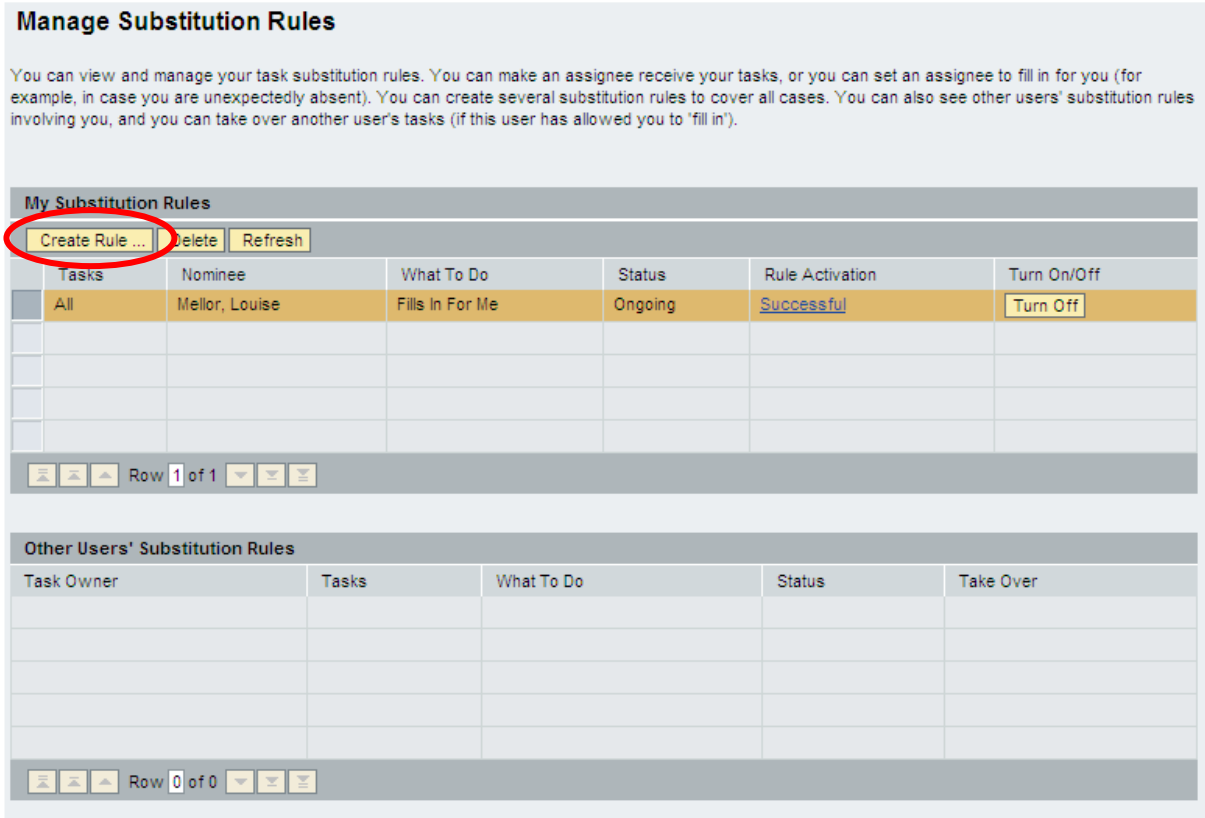
On a weekly basis email reminders are sent out to users and their ‘**Receive My Tasks**’ substitutes if there are any outstanding invoice work items including those where a request for information has been received. If either the original recipient or the substitute has opened a work item and it is currently showing as ‘**In Progress**’ the reminder will still be sent to both users as the person who has opened it may now not be available and therefore it is a prompt to follow this up.

To manage your substitutions, click the small icon circled below.



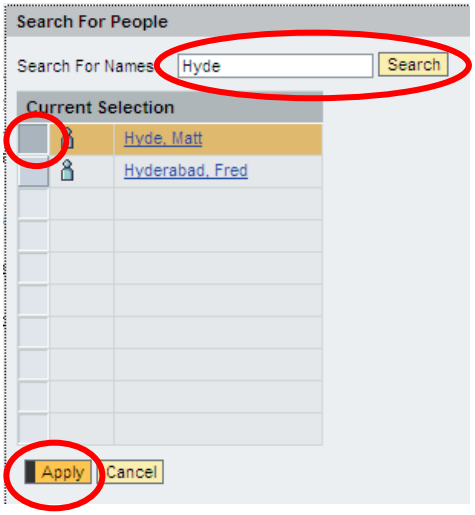


Select **Manage Substitution Rules**



To create a new substitution, select Create Rule ...

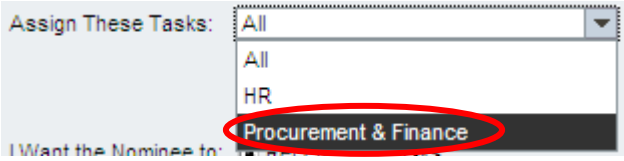
To find a person, click Select...



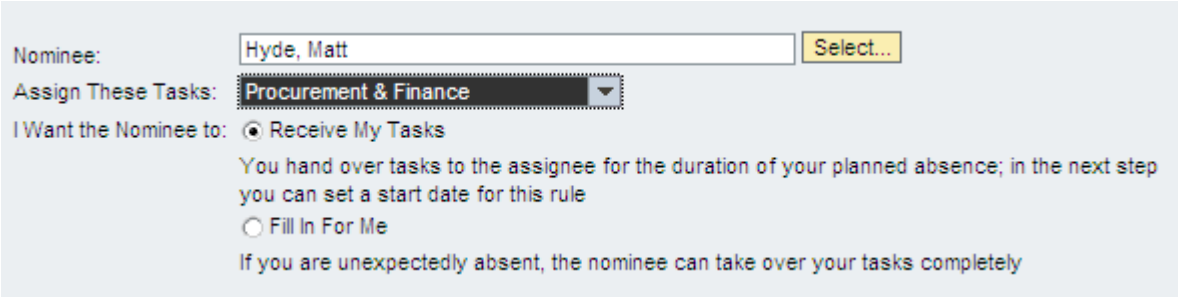
Type in the manager's name (Surname, Forename) in the **Search For Names** field and then click Search.

Select the correct manager by clicking the button to the left of the name.

Click Apply.



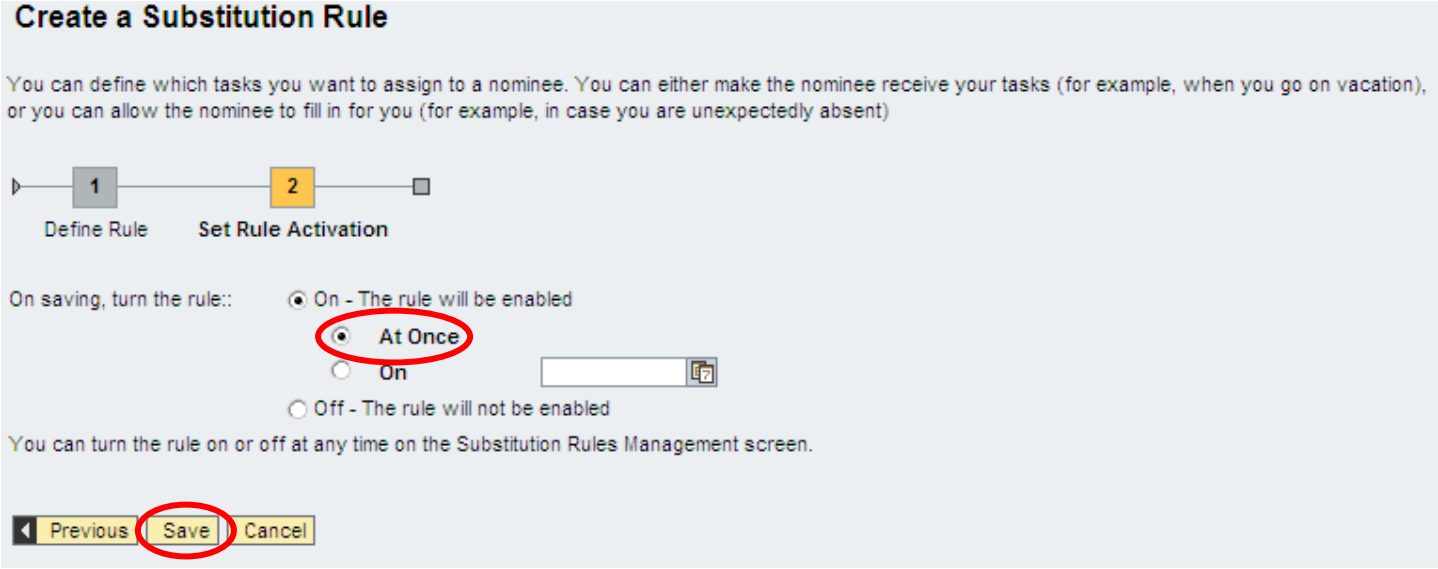
Choose '**Procurement & Finance**' to allow you to process Invoice Work Items.



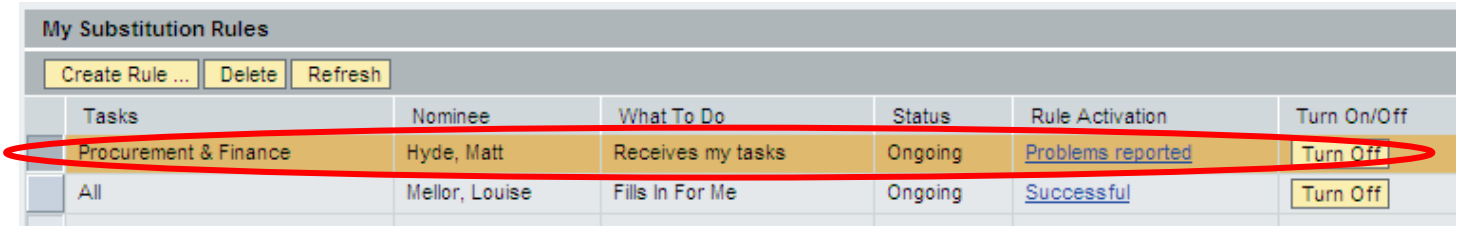
Select '**Receive My Tasks'**

You should *always* have *at least one* 'Receive My Tasks' substitution rule if you are likely to process invoice work items.

When you have finished making your selections, click Next.

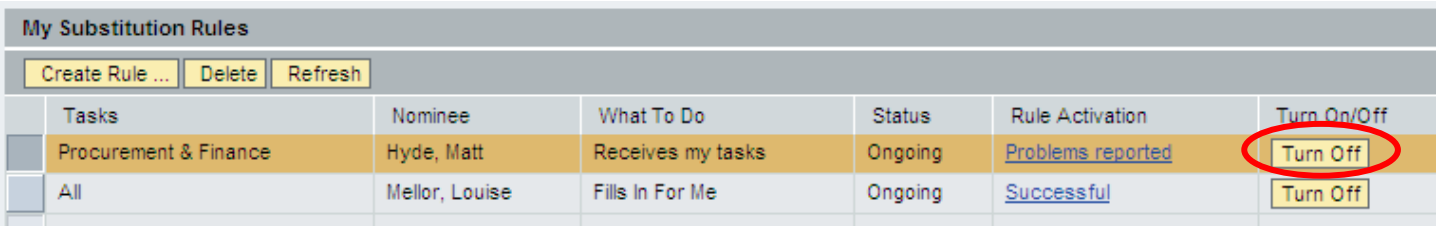


Select '**At Once'** and click Save. You will return back to the **Manage Substitution Rules** screen where you will now see your new rule listed:

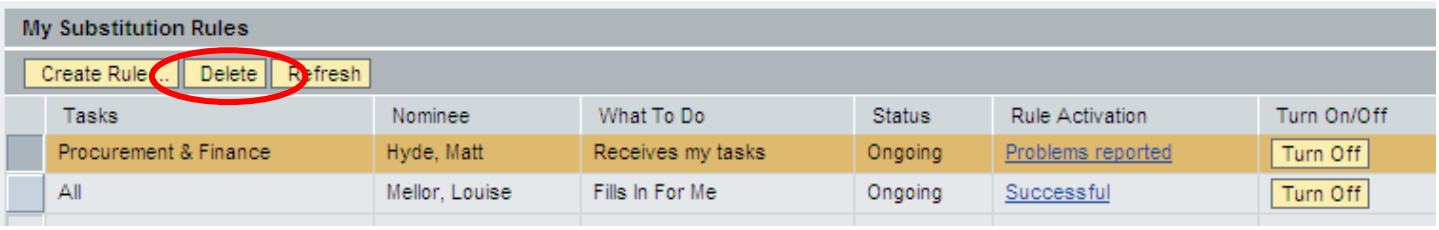


If you need to delete or temporarily remove a substitution once it has been set up you can do either of the following:

Click on Turn Off or Turn On to turn the rule off or on:



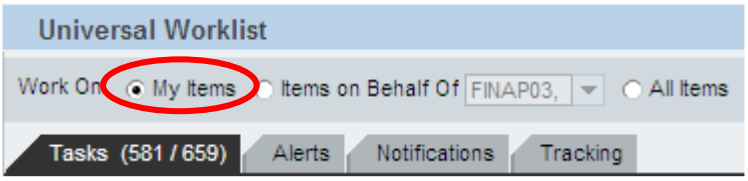
Select the item and click Delete and the item is removed:



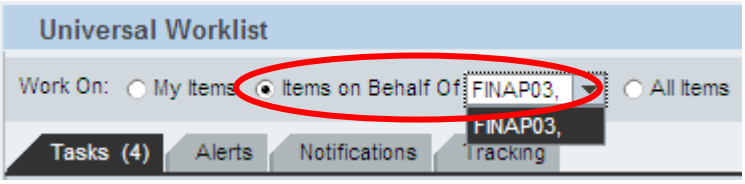
Close the window to return to your Universal Worklist.

When opening your Universal Worklist you will have a number of options:

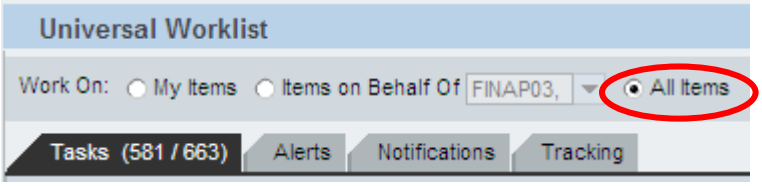
Select '**My Items**' to only display the items that have been sent to you and are either New or In Progress.

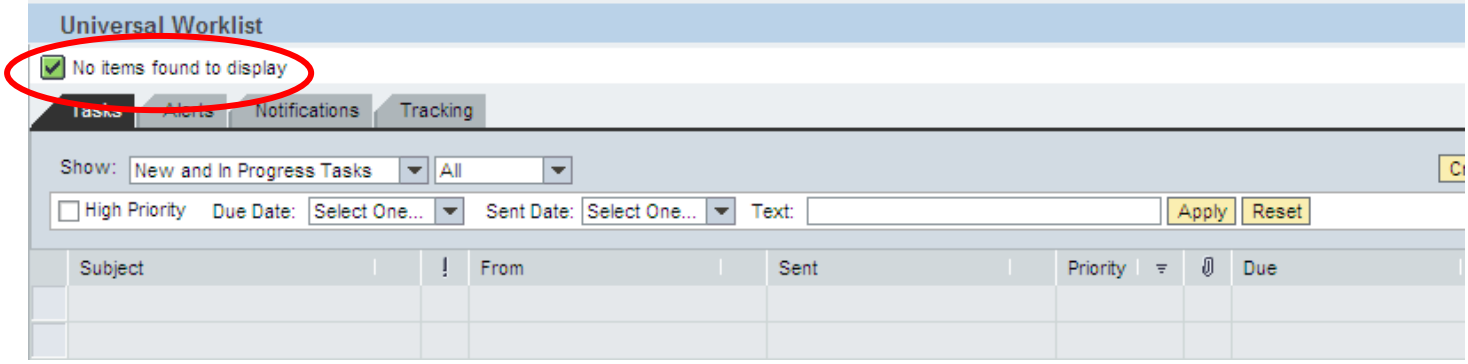


Select '**Items on Behalf Of'** and from the dropdown list select the relevant user to display only those items belonging to the user you substitute for including New or In Progress items:



Select '**All Items**' to see all your items and those you substitute for.



If you open an item belonging to the person you substitute for, the item is now '**In progress'** with yourself and will not show in their list. If you need to replace the item, select it and click on the '**Cancel Assignment**' option at the bottom of the screen and the status will change to '**New**'.

If there are no items in the Universal Worklist you will get the following message: