



Setting Up Substitutes

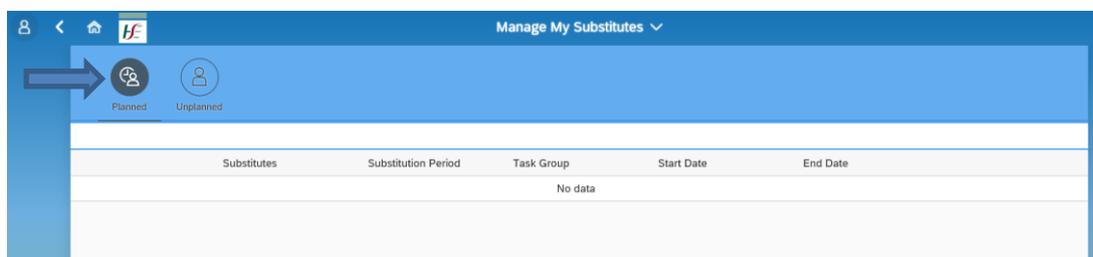
There are 2 options in Substitutions – Planned (specified period of time) or Unplanned (assigned indefinitely and activated as required by the Substitute Manager – recommended for covering unexpected periods of leave).

Setting a Planned Substitute

1. Log on with Manager username/password.
2. Go to My Inbox tile.
3. In My Inbox select the  icon.
4. Choose “Manage My Substitutes” from the menu.



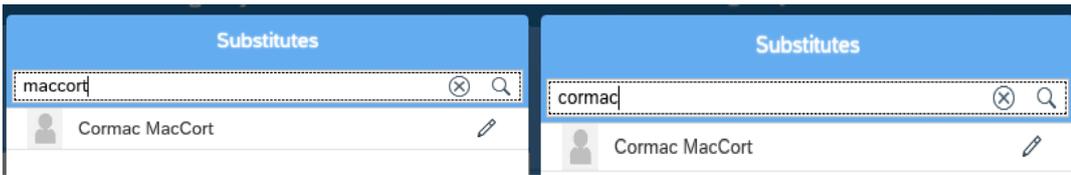
5. The Manage My Substitutes screen currently defaults to Planned.



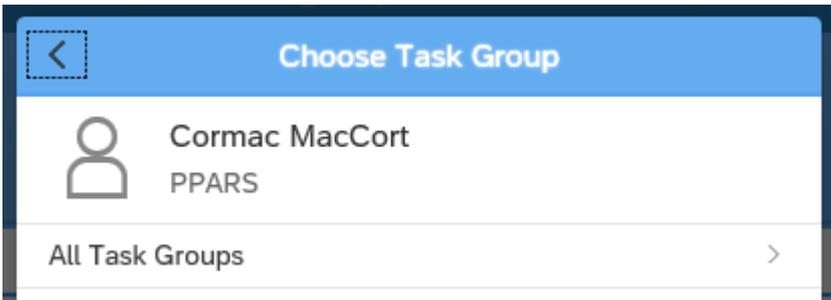
Add New Substitute

6. Select the “Add New Substitute” button from the bottom of the screen.

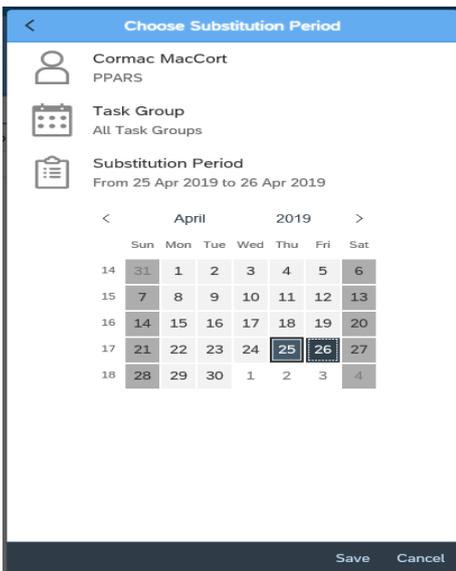
7. Search for the relevant substitute manager by name. (Only users who are set up with an “M” user name can be viewed on the listing – if the person you are searching for does not appear then an “M” Manager username will need to be assigned to them prior to setting up substitute).



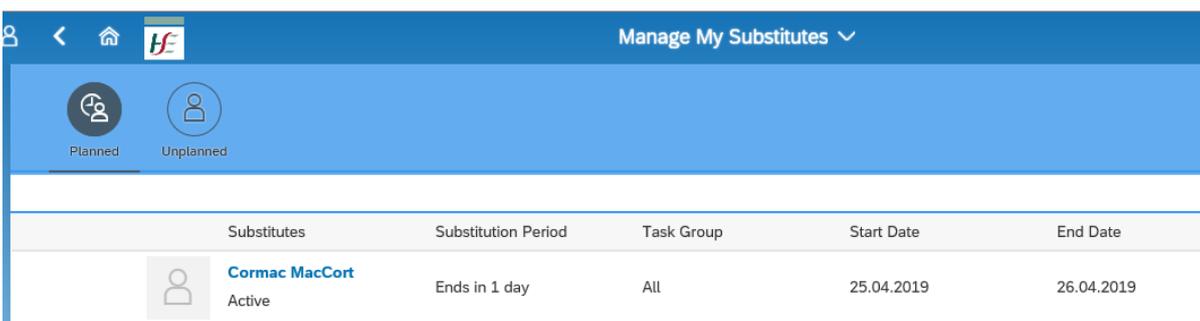
8. Select the relevant manager and choose “All Tasks”.



9. Select Substitution period and save – in this case 25/04/19 - 26/04/19



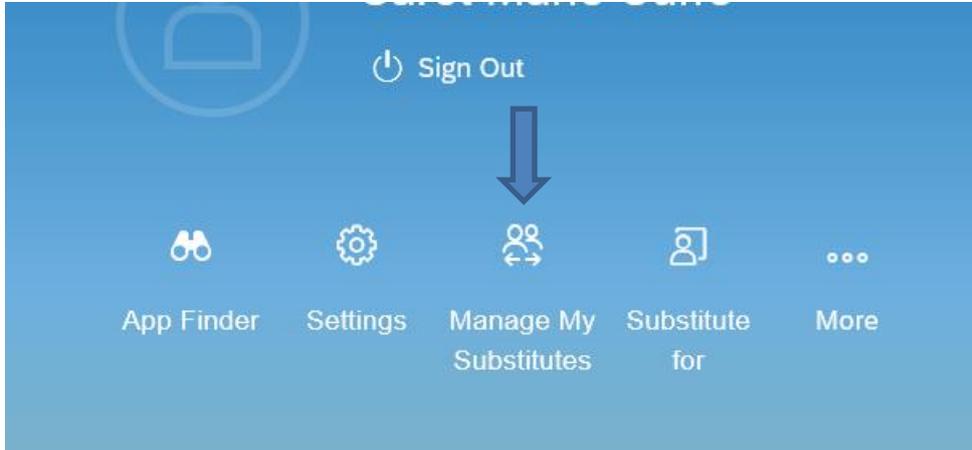
10. The Substitution is set up and displayed in “Manage My Substitutes”.



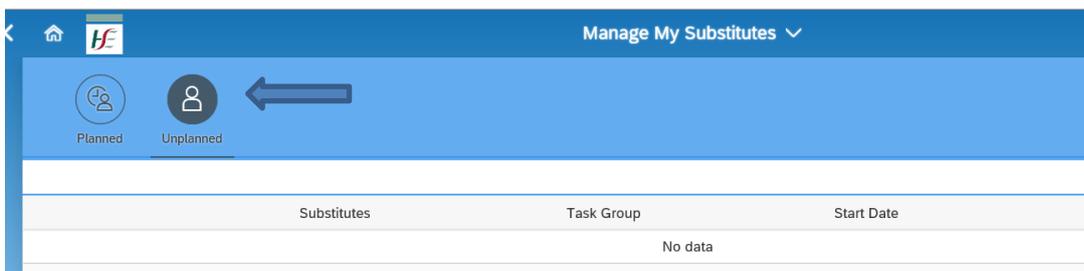
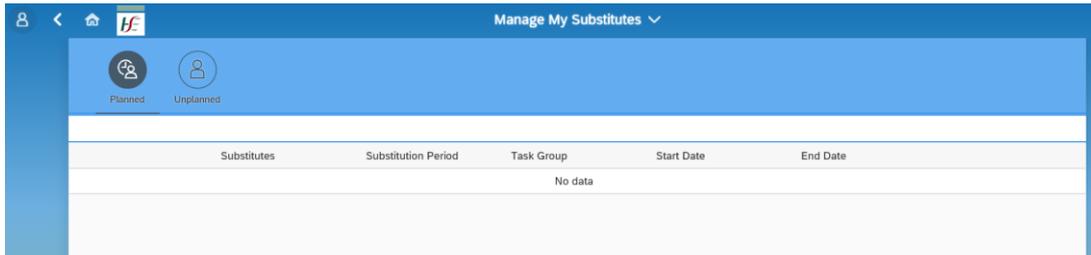
All Leave Requests and Travel Claims will flow to the Managers Inbox and the Substitute Managers Inbox for the specified period i.e. 25.04.2019 – 26.04.2019. Once this period passes only the Manager will receive the requests.

Setting up an Unplanned Substitute

1. Log on with Manager username/password.
2. Go to My Inbox tile.
3. In My Inbox select the  icon.
4. Choose “Manage My Substitutes” from the menu.



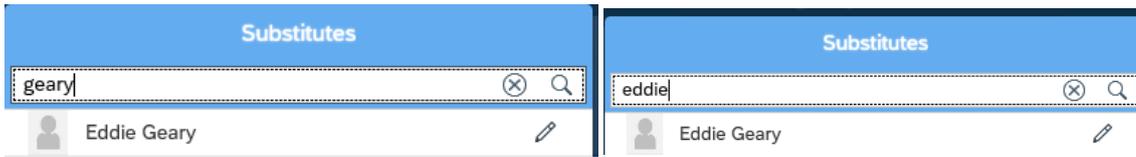
5. The Manage My Substitutes screen currently defaults to Planned – please select the “Unplanned” button.



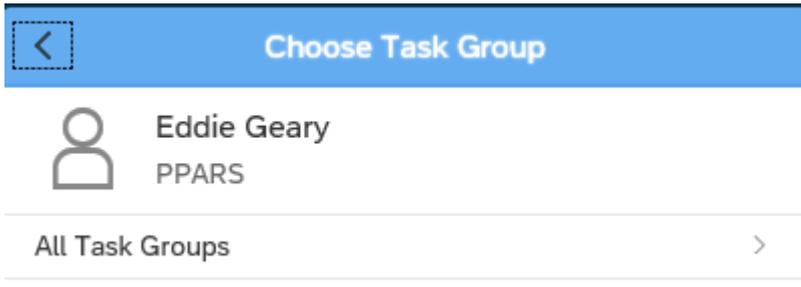
6. Select the “Add New Substitute” button from the bottom of the screen.

Add New Substitute

7. Search for the relevant substitute manager by name. (only users who are set up with an “M” user name can be viewed on the listing – if the person you are searching for does not appear then an “M” Manager username will need to be assigned to them prior to setting up substitute)

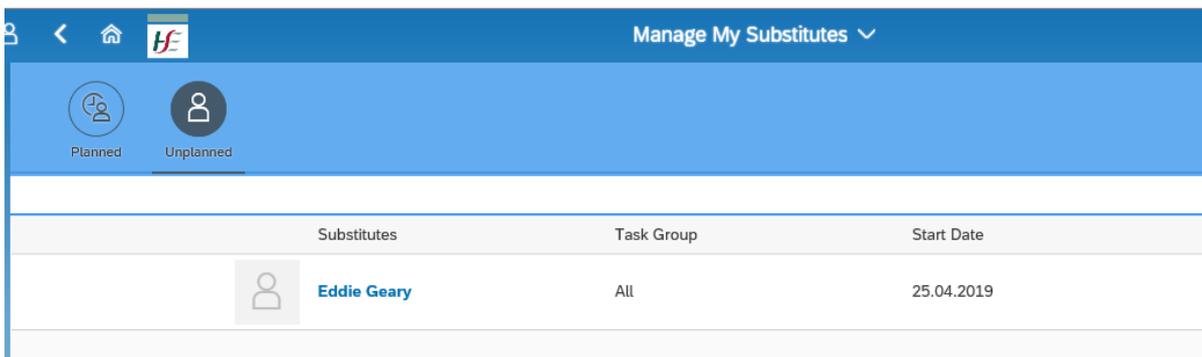


8. Select the relevant manager and choose “All Tasks” and Save.



- **Unplanned substitutes are activated/deactivated by the Substitute Manager as and when required therefore no period is specified – it is available for activation from the day the substitution is set up. (further details re activation below)**

9. The Substitution is set up and displayed in “Manage My Substitutes”.

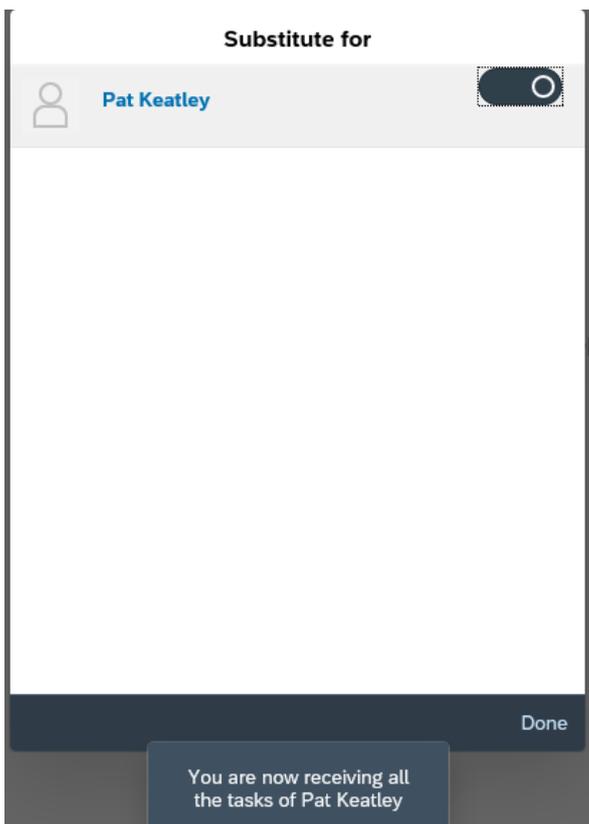


Activating an Unplanned Substitute

1. Log on with Manager username/password. (Substituted Manager)
2. Go to My Inbox.
3. In My Inbox select the  icon.
4. Select the “Substitute for” button.



5. Activate substitution by sliding the button to the right and select “Done” – message appears “*You are now receiving all the tasks for Pat Keatley*” (all unapproved items will now appear in your inbox).



6. Once the substitution period has passed, follow the same steps above to deactivate the substitution (all unapproved items in your Inbox relating to Direct Reports of the manager you substituted for will be removed from your Inbox).