

How to Maintain a Workflow Substitution During an Absence

Task can be performed at work or home since all steps performed on the KHRIS Portal <https://khris.ky.gov>.

(1) Open Worklist

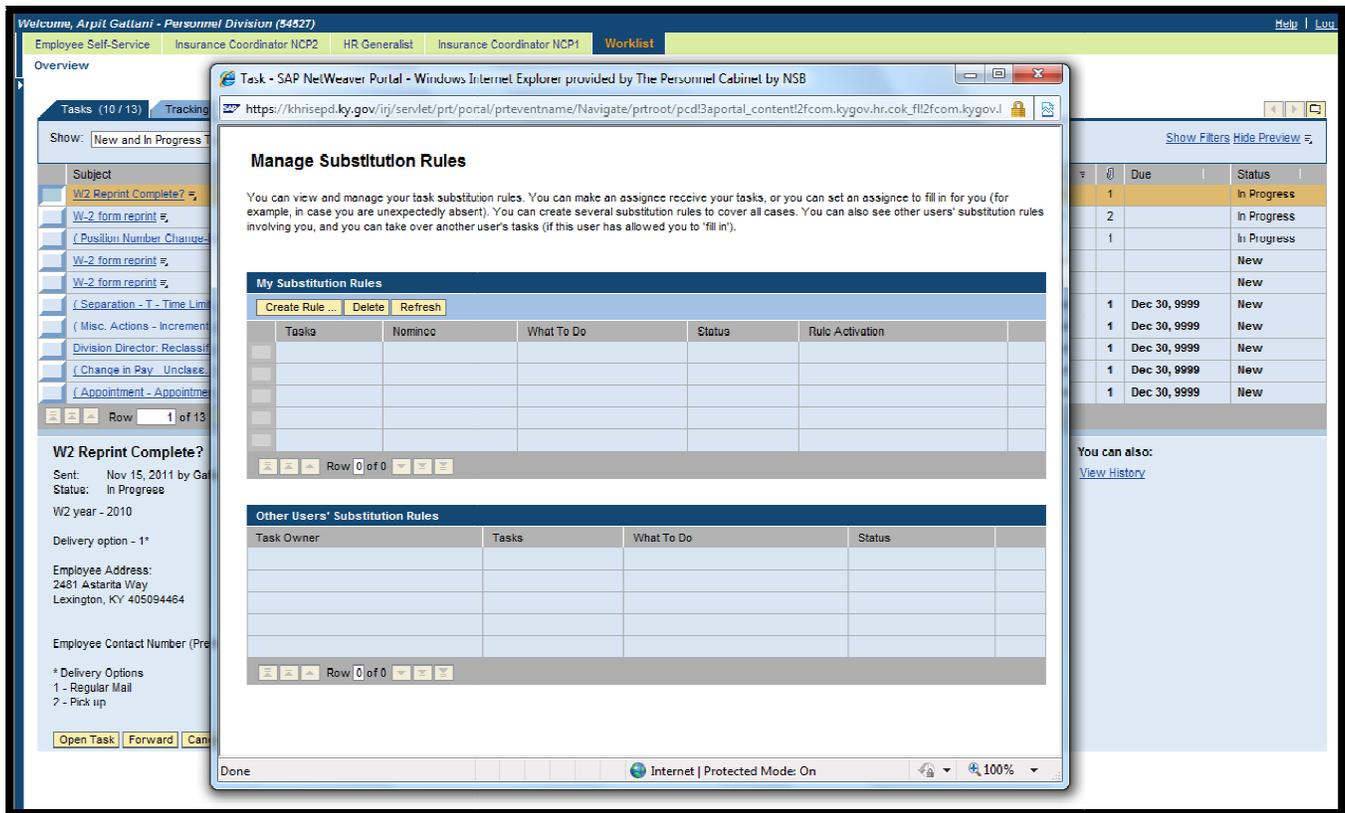
The screenshot shows the KHRIS Portal interface for Arpit Gattani in the Personnel Division (54527). The 'Worklist' tab is active, displaying a list of tasks. The first task, 'W2 Reprint Complete?', is selected. Below the list, a detailed view of this task is shown, including its status (In Progress), priority (Normal), and various administrative details like employee address and contact information. Buttons for 'Open Task', 'Forward', and 'Cancel Assignment' are visible at the bottom of the task details.

Subject	From	Sent	Priority	Due	Status
W2 Reprint Complete?	Gattani, Arpit	Nov 15, 2011	Normal		In Progress
W-2 form reprint	Gattani, Arpit	Nov 1, 2011	Normal		In Progress
(Position Number Change-Interna - TWI Vol) for Randell T Ramey in agency 54527	USER_R3_DATASOURCE.JHM0024	Nov 4, 2011	Normal		In Progress
W-2 form reprint	Gattani, Arpit	Nov 1, 2011	Normal		New
W-2 form reprint	Gattani, Arpit	Nov 1, 2011	Normal		New
(Separation - T - Time Limit) for Brenda J Purnell in agency 80000	Ramage, Gary	Nov 29, 2011	Normal	Dec 30, 9999	New
(Misc. Actions - Increment date change) for Vicki L Mackey in agency 54523	Short, Brandon	Nov 28, 2011	Normal	Dec 30, 9999	New
Division Director Reclassification - Approve	Banks, Derrick	Nov 18, 2011	Normal	Dec 30, 9999	New
(Change in Pay - Unclass. Probation. Increase) for Lois C Forgy in agency 80000	Ramage, Gary	Nov 8, 2011	Normal	Dec 30, 9999	New
(Appointment - Appointment) for Testino Return in agency 54527	Banks, Derrick	Nov 7, 2011	Normal	Dec 30, 9999	New

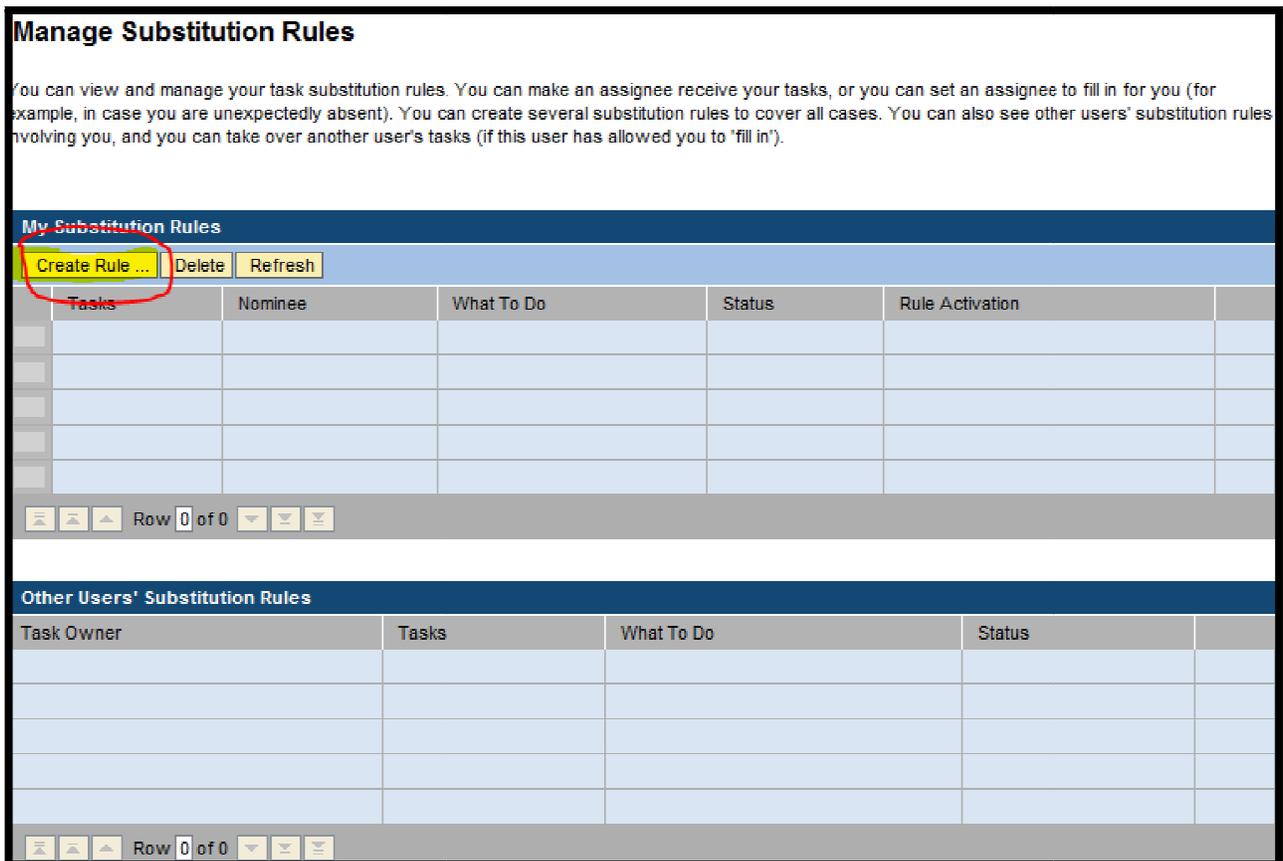
(2) Select "Manage Substitution Rules" from dropdown after "Hide Preview"

This screenshot is similar to the first one but highlights a specific action. A red box is drawn around the 'Show Filters Hide Preview' link in the top right of the task list. A dropdown menu is open, showing three options: 'Refresh', 'Manage Substitution Rules', and 'Display Connection Status'. The 'Manage Substitution Rules' option is highlighted in orange, indicating it is the selected action.

(3) A new window for Manage Substitution Rules will pop up.



(4) Choose "Create Rule"



(5) Provide following information

Nominee: Person who is going to receive work items in your absence.

Assign These Tasks: Select All

I Want Nominee To: Receive My Tasks OR Fill In For Me

Choose "Next"

Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)



Nominee:

Assign These 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 nominee can take over your tasks completely

(6) Select an option as to when this rule should begin.

If immediate, select option "At Once"

Else provide a begin date

Choose "Save".

Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)



On saving, turn the rule::

On - The rule will be enabled

At Once

On

Off - The rule will not be enabled

You can turn the rule on or off at any time on the Substitution Rules Management screen.

(7) You should now see a rule created with status *Ongoing* which means your work items will now also be received by your identified Nominee. Once back from leave, you can deactivate the rule by selecting "Turn Off" option.

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

	Tasks	Nominee	What To Do	Status	Rule Activation	
<input checked="" type="checkbox"/>	All	Popplewell, Neil	Receives my tasks	Ongoing	Successful	<input type="button" value="Turn Off"/>
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Row 1 of 1

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	

Row 0 of 0