KNOWLEDGE BASE ARTICLE

How to Assign a Substitute to Your Direct Report

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Overview

Employees can name a substitute in their own time-off request. Sometimes this is not enough: the employee forgets, the absence is unplanned, or you simply want to arrange cover yourself. In that case you create a substitution directly in the Substitutions **web part** with the **Assign a substitute** button.

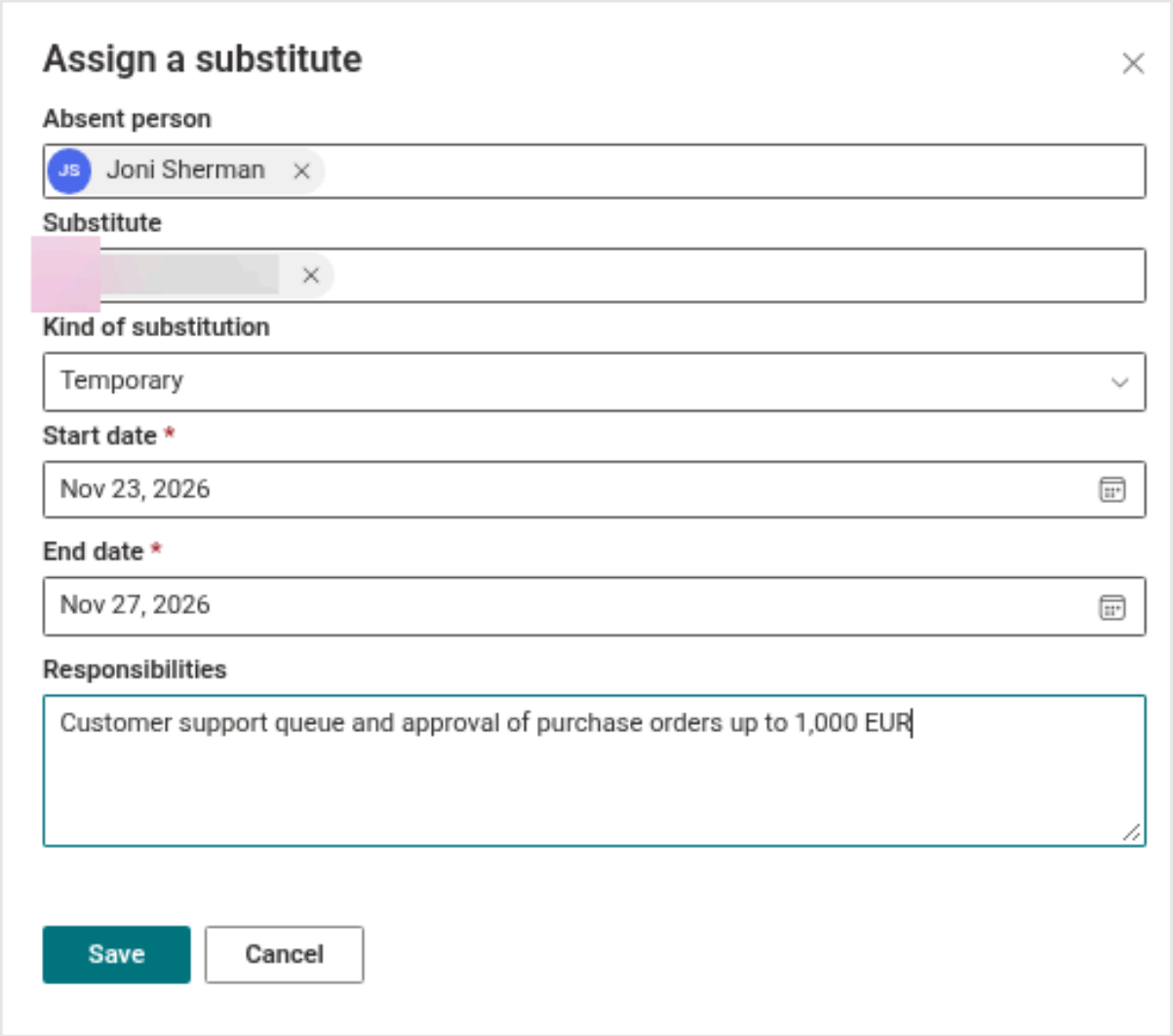
This article shows how to assign a substitute to a direct report, what the fields mean, and what happens after you save.

Warning

The product must already be installed and the Substitutions web part added to a page of your **site**. If it is not, start with KB10035. How to Install a Vitextra Product in SharePoint Online and KB10324. How to Add the Absence & Coverage Web Parts to a Page and Select the Site.

Assign a substitute step by step

1 Open the page with the Substitutions web part and click **Assign a substitute** in the toolbar. The **Assign a substitute** panel opens on the right.
2 In **Absent person**, replace your own name with the employee who is away. Start typing a name and select the person from the suggestions.
3 In **Substitute**, select the colleague who will cover.
4 In **Kind of substitution**, keep **Temporary** for cover during an absence. Choose **Handover of duties** only when duties pass on permanently (see KB10349. How to Hand Over Duties When an Employee Leaves (No End Date)).
5 Select the **Start date** and the **End date**. For a temporary substitution both dates are required.
6 In **Responsibilities**, describe what the substitute takes over: tasks, approvals, customers, shared mailboxes. The text is shown to everybody who sees the substitution.
7 Click **Save**. The panel closes and the message *The substitution was created. The substitute has to confirm it.* appears above the **list**.



The Assign a substitute panel with all fields filled in

The fields of the panel

Field	Required	Notes
Absent person	Yes	One person. Prefilled with your own name; change it to your direct report. The product does not restrict the choice to your direct reports.
Substitute	Yes	One person. It cannot be the absent person.
Kind of substitution	Yes	Temporary (default) or Handover of duties. For a

Field	Required	Notes
		handover the panel shows the hint *A handover of duties has no end date unless you set one.*
Start date	Yes	First day of the cover.
End date	Yes for Temporary	Cannot be earlier than the start date. Optional for a handover; the label then reads End date (optional).
Responsibilities	No	Free multi-line text.

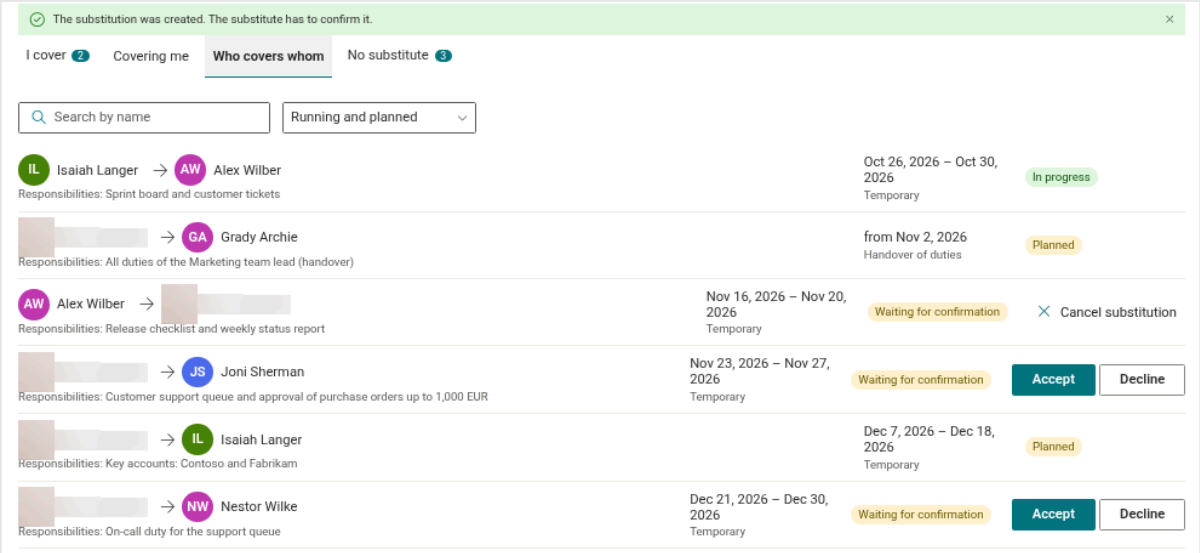
If something is missing, the panel shows an error above the fields instead of saving: *Select the person who is absent.*, *Select the substitute.*, *The substitute cannot be the absent person.*, *Select the start and end dates.* or *The end date cannot be earlier than the start date.*

What happens after you save

The new substitution always starts with the status **Waiting for confirmation**: it remains unconfirmed until the substitute accepts it. Everyone involved finds it in a different place:

Who	Where	What they see
The substitute	**I cover** tab, with a number badge	The **Accept** and **Decline** buttons (KB10347. How to Accept or Decline a Substitution)
The absent employee	**Covering me** tab	The substitute and the status pill; the **Cancel substitution** action
You and everyone else	**Who covers whom** tab (filter *Running and planned*)	The pair Substitute → Absent person, the period, the kind and the status (KB10348. How to Find

Who	Where	What they see
		Out Who Covers Whom)



A newly created substitution waiting for confirmation

Note

The product sends no e-mail or Teams message. Tell the substitute that a substitution is waiting: the person sees it with a number badge on the **I cover** tab the next time they open the page.

Assign from the list of absences without a substitute

If the employee already has an approved absence, there is a quicker way. Open the **No substitute** tab and click **Assign** in the row of that absence. The same panel opens with the person and the dates already filled in, and the new substitution is tied to that absence (KB10338. How to Find Absences Without a Substitute). A substitution created with the toolbar button is not tied to any request and is not recognised as cover for a specific absence there.

Warning

Only the absent person can cancel a substitution in the web part, using **Cancel substitution**, while the substitution is pending or accepted and its end date has not passed. As the manager, you cannot cancel a substitution you created for your direct report. If you assigned the wrong substitute, ask the employee to cancel it and create a new one.

Terms

List
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

Site
A SharePoint site is a container for information within the SharePoint platform. Sites typically offer features such as document libraries, lists, calendars, discussion boards, and workflows, facilitating collaboration, communication, and document management within teams or across departments. Sites can be customized and configured to suit the specific needs and workflows of an organization.

Web Part
A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.