

Setting a Vacation Rule for a planned absence

iProc Approver | Oracle Financials

This guide is intended for iProc Approvers who wish to delegate their approvals during a planned absence in the iProcurement (iProc) part of the Oracle Financials system.

If you're going to be on a planned absence you'll need to set up your *Vacation Rule* in iProc. This is similar to the out-of-office you set on an e-mail account. You will delegate your approvals to an appropriate Approver in your area who has been trained and has access to the *PO Internet Approver (UOM)* responsibility.

You are delegating your authority and responsibilities as an Approver. It is therefore vital that the person to whom you re-assign your approvals is appropriate to assume this responsibility.

You can access Oracle Financials via this link: <http://financelive.fin.manchester.ac.uk/>

To set up a vacation rule you will need to:

1. Click the **PO Internet Approver (UOM)** responsibility to open iProc.
2. Click the **Approvals** tab then click the **Vacation Rules** link at the top left area of the screen.
3. Click the **Create Rule** button.
4. The Item Type defaults as --All--. Leave this as the default and click **Next**.
5. Enter the **Start Date** and **End Date** of your planned absence. Use the **calendar** icons if necessary.



When you set the *Vacation Rules End Date*, it automatically sets the time of the *End Date* to the same time you created the *Vacation Rule*. This means the *Vacation Rule* is only active within the date and time displayed. If you wish the *Vacation Rule* to end at a particular time you will need to change the time shown on screen.

6. If you wish you can enter a **Message** that the Requisitioner and the alternative Approver will see when requisitions are generated for your approval during the time period set for the *Vacation Rule*.
7. Select the **magnifying glass** icon next to the **Reassign** field.
8. You will need to search for the Approver you wish to re-assign your approvals to during your planned absence. Click into the search field and enter the **Approver's surname**. Use the **%** wildcard to help with searching eg **%jones%**. Press the **Enter** key to run the search, or click **Go**.



When you re-assign you are delegating your authority and responsibility. It is therefore paramount that the person to whom you re-assign your approvals is appropriate to assume this responsibility.

9. The matching results will appear. Use the **Quick Select** icon to select the correct Approver.
10. Make sure **Delegate your Response** is selected and not *Transfer Notification Ownership*.
11. Select **Apply** to set up the *Vacation Rule*. The Approver to whom you have delegated the approvals is now shown.
12. You have now set up your *Vacation Rule* for the time period specified. The delegated Approver will begin to receive your approvals from the start date (and time) entered. The *Vacation Rule* will end at the date (and time) specified on the end date.
13. If you need to edit or delete the *Vacation Rule*, you can click onto the **Approvals** tab then click the **Vacation Rules** link at the top left area of the screen and use **Update** to edit the rule, or **Delete** to remove the rule if necessary.