



Manage Vacation Rule for Delegating Approvals

This guide will cover:

- Creating vacation rules which will delegate your approvals to others while you are out.

Manage Vacation Rule for Delegating Approvals is a process used if you have a need to be away from the office for an extended period of time for vacation or other unrelated reasons. Before being out of the office, you can delegate your approvals to someone so while you are out other employees are not waiting on your approval to complete daily business processes.



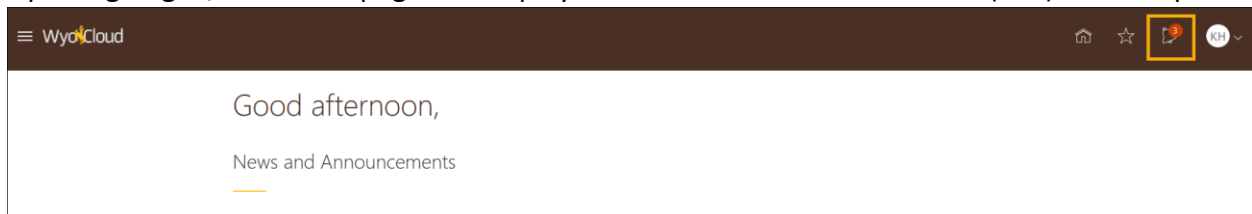
Assigning a vacation rule and delegating your approvals will delegate **BOTH** Finance and HR transactions. If it's crucial to split the approvals between Finance and HR, please submit a ticket through userhelp@uwo.edu.

It is recommended that you **only** delegate approvals to individuals who either share the same security access or higher. The process of delegating tasks to subordinates or other individuals exists across several business processes within WyoCloud. Below are just a few examples of what types of approvals would be delegated:

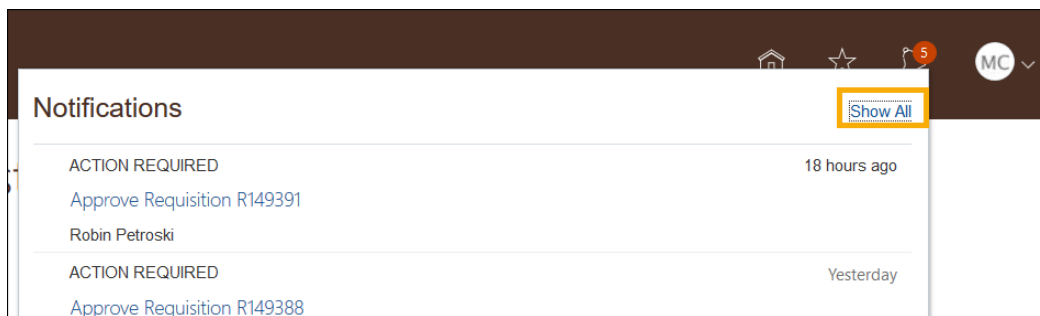
Area	Examples
HR Transactions	Termination, Salary changes, etc.
Expense	Expense reports, Cash advances, etc.
General Ledger	Journal entry, IDT transfers, etc.
Procurement	Requisitions, Purchase orders etc.

Step One

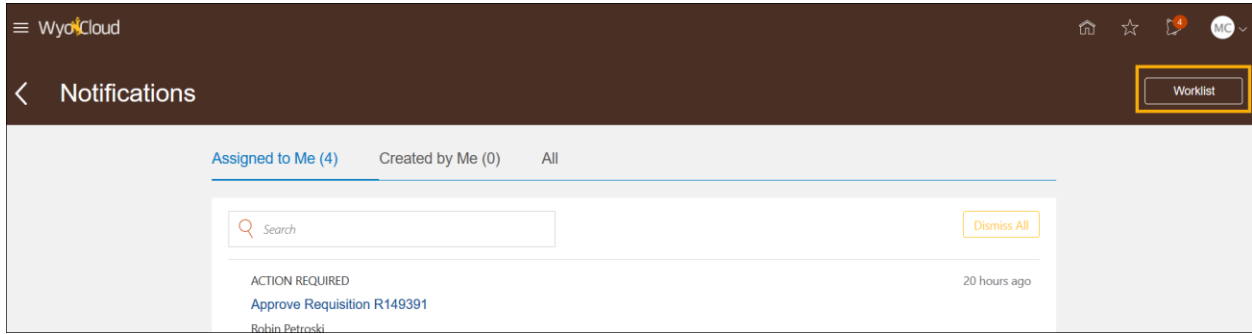
- Upon signing in, this home page will display. Click on the **Notifications icon** (bell) at the top:



- From the Bell icon select **More Details**.



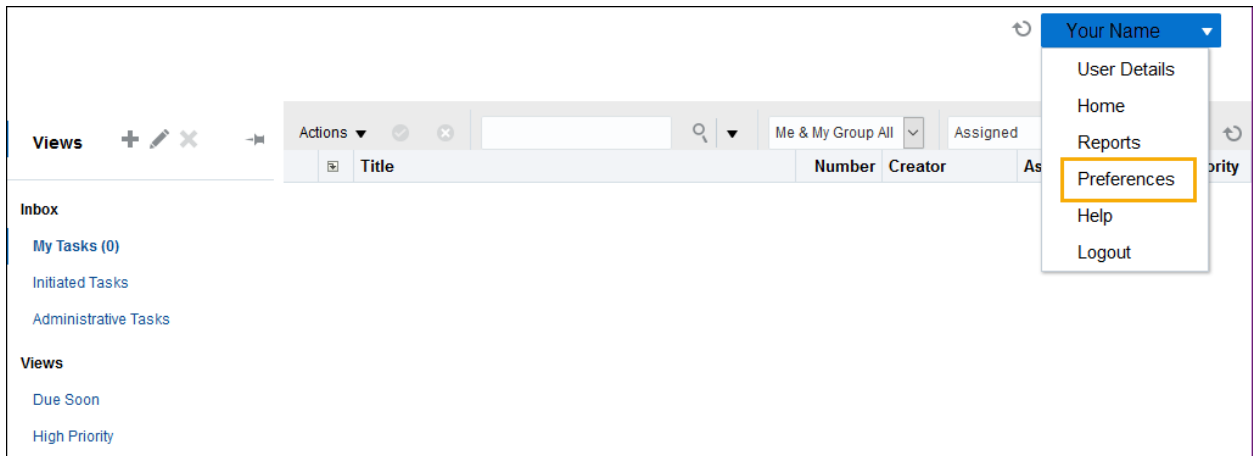
- Click on **Worklist** in the upper right corner of the page.



Step Two

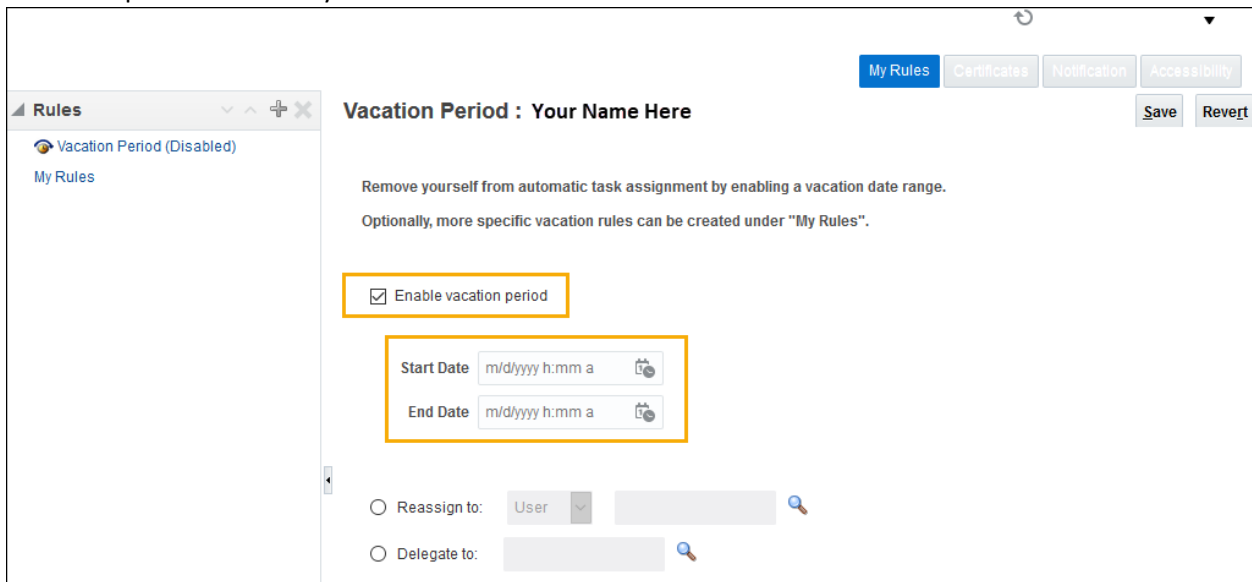
When the pop-up box appears:

- Click the **down arrow** next to your name to open the drop down menu, and then select **Preferences**:



A pop up window will appear. Ensure the following steps are completed:

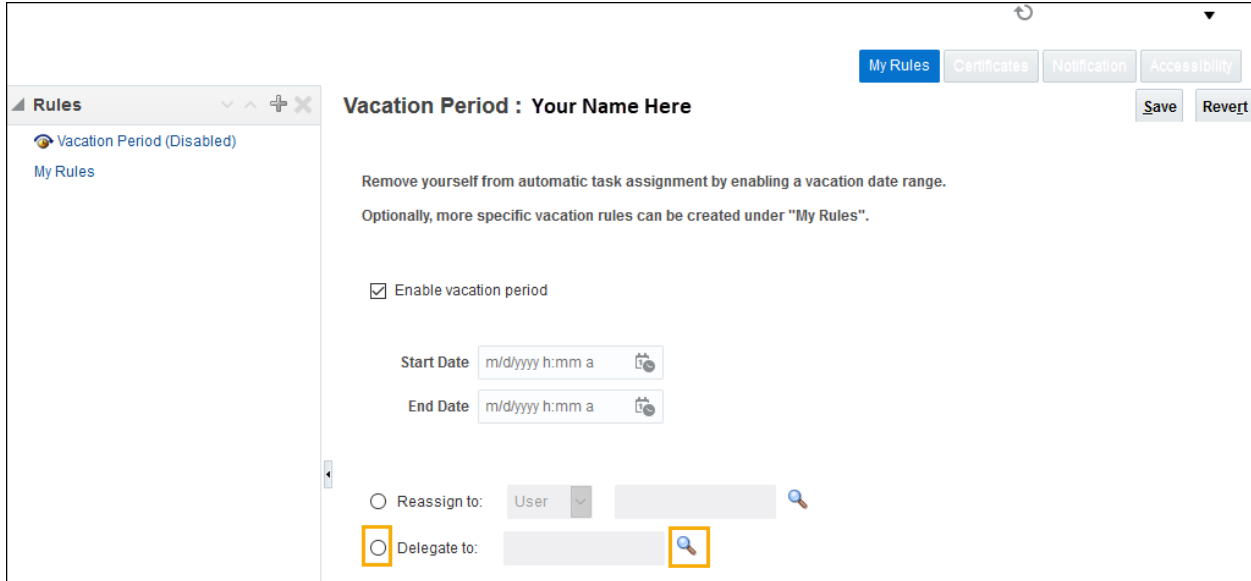
- Check **Enable Vacation Period**
- Input the dates of your vacation in the **Start Date** and **End Date** fields



Step Three

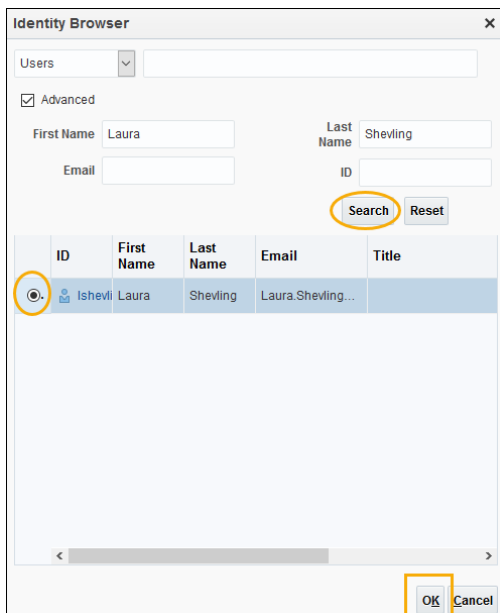
Select to delegate your approval duties, by completing the following steps:

- Select the **'Delegate to'** Radio Button and then select the **Search** icon:



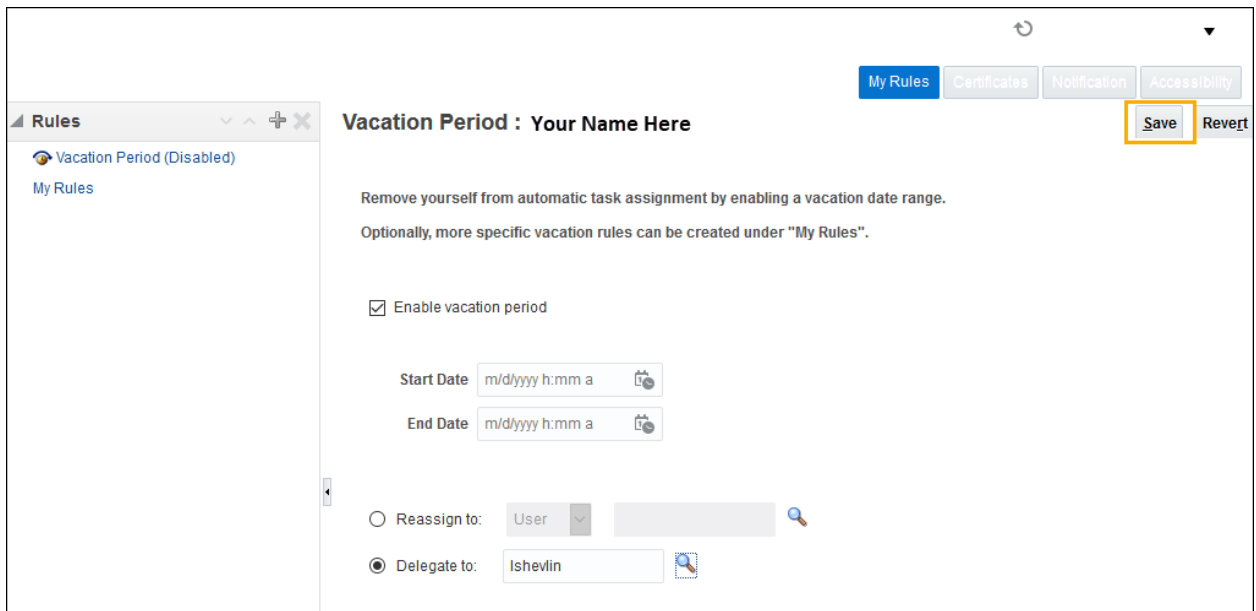

DO NOT select the **'Reassign to'** radio button. Reassigning approvals does not allow the user to view the transactions approved when they return after being away from the office.

- The **Identity Browser** pop up window will appear. Type in the first and last name of the individual you want to delegate to and then select **Search**.
- Your results will populate below. Select the radio button next to the person's name and then click **OK** as seen below:



ID	First Name	Last Name	Email	Title
<input checked="" type="radio"/>	Ishvli	Laura	Shevling	Laura.Shevling...

- Once complete, select **Save** in the top right corner:



You have now completed the steps of Vacation Rules for Delegating Approvals.