Manage Vacation Rule for Approvals Reassignment

This guide will cover:

- Creating vacation rules which will reassign your approvals to others while you are out.
- Creating additional rules for certain periods of time.

Manage Vacation Rule for Approvals Reassignment 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 reassign your approvals to someone so while you are out, other employees are not waiting on your approval to complete daily business processes.

It is recommended that you only reassign to individuals who either share the same security access or higher.

The process of reassigning tasks to subordinates or other individuals exists across several business processes within WyoCloud. Below are just a few examples of when this operation can be performed:

<table>
<thead>
<tr>
<th>Business Area</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense</td>
<td>Expense reports, Cash advances, etc.</td>
</tr>
<tr>
<td>General Ledger</td>
<td>Journal entry, IDT transfers, etc.</td>
</tr>
<tr>
<td>Procurement</td>
<td>Requisitions, Purchase orders etc.</td>
</tr>
</tbody>
</table>

**Step One**

- Upon signing in, this home page will display. Click on the **Notifications icon** (bell) in the top right corner:
Navigation: from the Bell icon select More Details > Financials:

Note: For vacation rules relating to Procurement, select Procurement from this drop down.

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 reassign your approval duties, by completing the following steps:

- Select the ‘Reassign to’ Radio Button, ensure the drop down is set to user and then select the Search icon:

  ![Image of the Identity Browser](image1.png)

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

  ![Image of the Identity Browser results](image2.png)
Once complete, select **Save** in the top right corner:

You have now completed the steps of Vacation Rules for Approval Reassignment.