Quick Reference Guide
Setting a Proxy
UNI e-Business Suite

BASIC PROXY RULES
- Must have an active account
- Proxy has to have the same approval rights as approver for Purchasing

SETTING A PROXY
1. Logon to UNI e-Business Suite
2. Select UNI Workflow User

Applications
- UNI Workflow User
- VP Admin Finance

3. Select Vacation Rules

Worklist

From | Subject
--- | ---
| Failed to reserve funds for Purchase Requisition 34238
| Unable to reserve Purchase Requisition 34238

TIP Vacation Rules: Redirect or auto-respond to notifications.

4. Click on Create Rule button

Oracle E-Business Suite

Vacation Rules

Create Rule

5. To activate Vacation Rule Type, follow below section a, b, or c.
   a. Select ALL to set one proxy for both purchasing approvals and UNI Time; click on the Next button and skip to Step 3.
   b. Select UNI Time Workflow Process to set a proxy for timecard approval only; click on the Next button and go to Step 2 and select ALL, click on the Next button and go to Step 3.
   c. To set one proxy for purchasing and a different proxy for UNI Time, select All and complete steps 6-7. Then, begin again and complete the entire process only selecting UNI Time as type of notification this time. Note: The person delegated for ALL notifications will receive Purchasing and the person delegated for UNI Time will receive UNI Time notifications.

6. Rule Response (see illustration)

   a) Enter start date (when the proxy is to start)
   b) Enter end date (when the proxy is to stop)
   c) Message field is optional
   d) Click on flashlight to find the person to act as proxy
   e) Search by Name using last name, click Go
   f) Select the person by clicking the circle under “Select”, then click the “Select” button.
   g) The person selected will populate the Delegate field.

7. Click the Apply button and Rule will display.

Notification Routing Rules

For questions email ebusiness-help@uni.edu.

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