



University of the Philippines Financial Management Information System



User Guide

Description:

Script ID	
Script Name	Set Vacation Rules
Information System	Financial Management Information System
Functional Domain	Financial Management Module
Purpose	To assign an OIC whenever the user may not be able to open his/her account and approve documents.
Data Requirement	Start date of leave/vacation End date of leave/vacation Name of OIC
Dependencies	
Scenario	The user will take a leave/vacation and may not be able to open his/her account
Author	

Revision History:

Version Number	Date	Author	Description of Change



Review and Acknowledgement:

Date	Name	Position	Comments



STEP 1 From the **Home Page**, under the **Worklist**, click **Vacation Rules**

Worklist				
				Full List
From ▲	Type	Subject	Sent	Due
Go Acc, Kenneth AP Invoice Approval		Invoice 8532 from Raj Inlayo requires your approval	22-Apr-2015	27-Apr-2015
✓ TIP Vacation Rules - Redirect or auto-respond to notifications.				
✓ TIP worklist Access - Specify which users can view and act upon your notifications.				

STEP 2 You will be directed to the **Vacation Rule** page. Click the **Create Rule** button.

Vacation Rules

Create Rule

Rule Name

You have not setup any notification routing rules. Please use the Create Rule button to create a new notification routing rule.

[Return to Worklist](#)

STEP 3 Select the notification type that will be transferred to the OIC then click next.

Item Type

Vacation Rule: Item Type

Select the type of notification that will activate this rule.

Item Type

If "--All--" is selected, you will skip to Step 3.

[Return to Vacation Rules](#)



STEP 4 Fill up all the fields

Vacation Rule: Response

* Indicates required field

Item Type **All**
 Notification **All**
 * Start Date 01-Jan-2015 00:00:00
(example: 20-May-2015 21:08:28)
 End Date 07-Jan-2015 00:00:00
 Message Extended Christmas Break

Comments will display with each routed notification

Reassign All Employees and Users Dela Cruz, Juan

Delegate your response
A manager may delegate all notification approvals to an assistant.

Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

Field Name	Description	Remarks
Start Date	Start date of leave/vacation	Note that the vacation rule will start on the given the specific date and time
End Date	End date of leave/vacation	Note that the vacation rule will end on the given the specific date and time. Leaving this blank will reassign all the documents to the OIC forever
Message	Message to the OIC on why you are reassigning the document to him/her	The message can also be viewed by the originator and other approver.
Reassign	Name of the OIC	Always select Delegate your response .

STEP 5 Click the **Apply** button to finalize the vacation rule.

Step 3 of 3



STEP 6 You will be redirected to the **Vacation Rule** page with the created Vacation rule

Vacation Rules

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: Dela Cruz, Juan	<All>	<All>			Inactive

STEP 7 To update the vacation rule settings, change the date or the selected OIC, click the update button. To cancel the vacation rule, leave is cancelled or vacation has ended sooner than expected, click the delete button.

Update	Delete



Result Information:

Expected Results

- Vacation Rule is created
- All selected document types will be reassigned to the selected OIC on the given date range.



FMIS – Open GL Period

No.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.