

Quick Reference Guide

Setting a MEMFIS Proxy

Effective at Implementation of HR/Payroll Modules – Phase II

BASIC PROXY RULES

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

SETTING A PROXY

1. Logon to MEMFIS
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
<input checked="" type="checkbox"/> TIP	Vacation Rules Redirect or auto-respond to notifications.

4. Click on Create Rule button

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Vacation Rules

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)

Vacation Rule: Response

* Indicates required field

Item Type: All
 Notification: All
 * Start Date: 22-Nov-2005 16:56:27
(example: 22-Nov-2005 16:56:27)
 End Date:
 Message:
 Comments will display with each routed notification
 Delegate: All Employees and Users

- 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

Search

To find your item, select a filter item in the pull-down list and enter a value in the text field, then select the "Go" button.

Search By: Name | hansmann | (Go)

Results

Select	Quick Select	Name	User Name	Email
	No search conducted.			

- e) Search by Name using last name, click Go

Results

Select	Display Name	User Name	Originating System
<input checked="" type="radio"/>	Hansmann, Jennifer C	JENNY.HANSMANN	Employee

- f) Select the person by clicking the circle under "Select", then click the "Select" button. The person selected will populate the Delegate field.

Vacation Rule: Response

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Item Type: All
 Notification: All
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 End Date:
 Message:
 Comments will display with each routed notification
 Delegate: All Employees and Users | Hansmann, Jennifer C

7. Click the Apply button and Rule will display.

Notification Routing Rules

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: Schellhardt, Thomas G	PO Requisition Approval	<All>			Active

8. To update or delete rule click on icons displayed.

For questions, please contact the Help Desk at 3-5555, option #2 or email memfis-help@uni.edu.

For questions about this document, please contact Jack Miller, MEMFIS Help Desk, at 3-5943.