

# *Receiving Proxy Notifications*

## **Introduction**

In this sub-topic you will learn about the Notifications functionality available to Receivers. The following topics will be covered within this section: (1) Notifications Review, (2) Business Process, (3) Receiving Proxy Notification Rule, and (4) Receiving as a Proxy.

### *Notifications Review*

This topic area will review what you should already know about Notifications.

### *Business Process*

This topic area covers the correct procedures to follow when preparing to have someone perform receiving actions in IAS on your behalf.

### *Receiving Proxy Notification Rule*

This topic area covers the process of creating a Notification Rule to designate a Receiving Proxy within IAS.

### *Receiving as a Proxy*

This topic area covers creating a receipt as a proxy within IAS.

## **Notifications Review**

### *Definition: Proxy*

*prox·y*

n. pl. prox·ies

1. A person authorized to act for another; an agent or substitute.
2. The authority to act for another.
3. The written authorization to act in place of another.

In earlier releases of IAS, Budget Approvers have had the ability to create Notification Rules which automatically forward Requisition Approval Notifications to an alternate Budget Approver when they are unavailable to manage their Notifications directly, such as when they are absent for vacation. This allows a designated alternate to act in the place of the original Budget Approver. This designated alternate is referred to as a **Proxy**.

A Proxy is a person authorized to act for another.

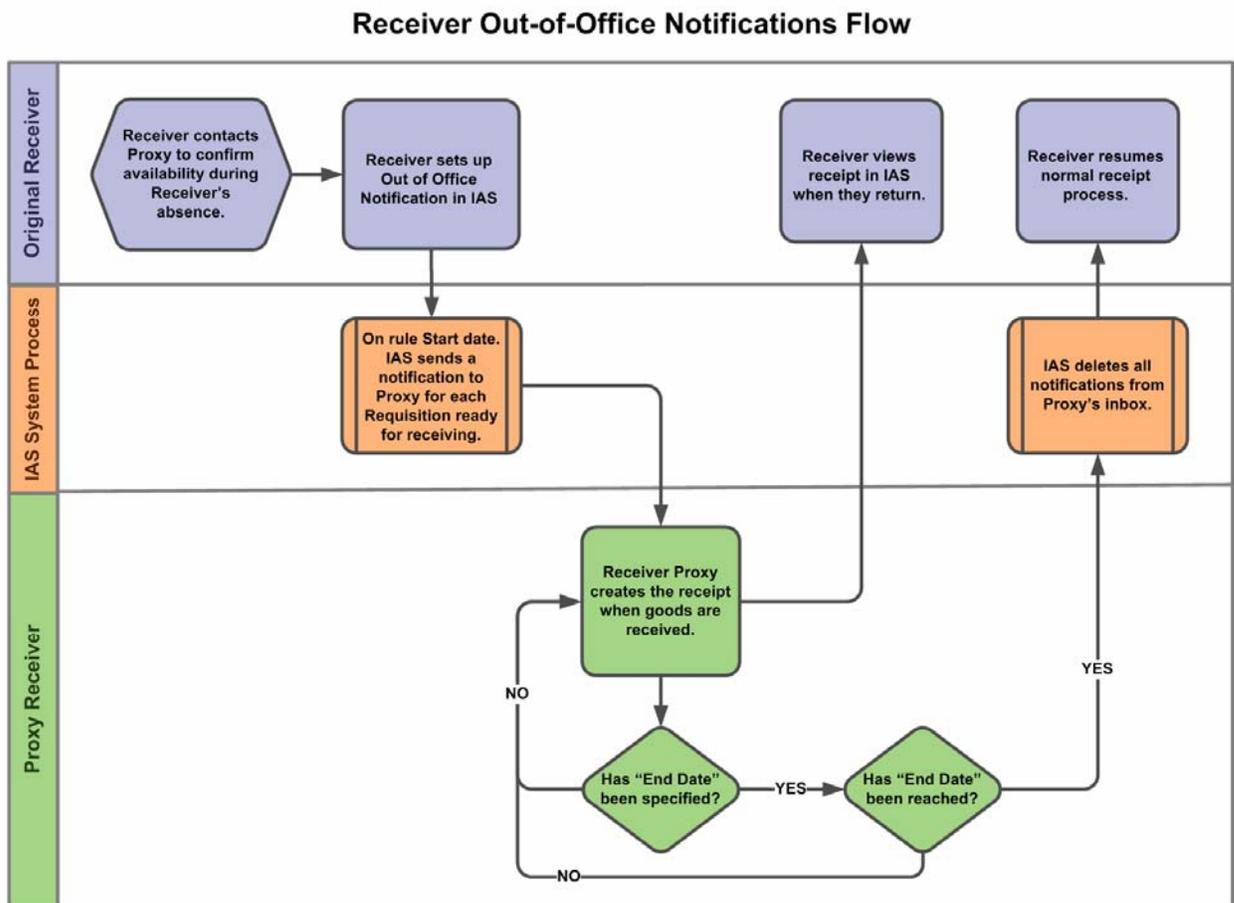
Previously, the only kind of Notifications that could be reassigned were Approval Notifications. In IAS Release 2.5, Receivers were given the ability to reassign Notifications to a designated alternate IAS user with Receiving authority, to receive goods on their behalf.

IAS allows you to create Rules for reassignment of Notifications. Each rule is specific to a user and can apply to any or all messages of a specific item type, such as the Confirm Receipts Item Type, and/or message name. A rule can result in one of two actions; reassigning the Notification to another user or responding to or closing the Notification automatically.

**Note:** IAS users may choose to reassign their Notifications to another user for a specified or limited period of time. This practice is highly recommended.

## Notifications Business Process

Before delegating authority to receive notification in IAS, the underlying system process should be thoroughly understood. Below is a process flow diagram that illustrates this step-by-step process by user-role.



If you are scheduling a planned absence, contact the colleague you will be designating as your Proxy, and confirm with that individual two very important prerequisites:

1. The Proxy must be *willing and available* during that time period to manage your Receipts.
2. The Proxy must be an IAS user with receiving privileges.

Once the Notification Rule goes into effect (the Start Date), IAS sends Notifications to the Proxy for all of the open Requisitions ready for receiving. The notification states that they have been designated with the authority to receipt for goods and services in IAS on your behalf. If a Requisition has been created but not yet placed on an approved award, a Notification will be sent to the Proxy after the award is approved. When the Proxy physically receives the goods or services, he/she can create the Receipt in IAS on the Receiver's behalf. Upon their return, the Receiver will be able to view all receipts created in their absence.

**Remember!** It is important to note that when a notification reassignment is established, a Start Date must be specified and an End Date is optional. If an End Date for the Proxy designation has not been specified, the Proxy will continue to receive Notifications indefinitely. For this reason, it is suggested that an End Date is always specified when setting up a Receiver Proxy.

## Receiving Proxy Notification Rule

To reassign Notifications, click on the **Vacation Rules** link under the *My Notifications* section on the *Shop* page.

The screenshot shows the Oracle iProcurement interface. At the top, there are navigation links for Shopping Cart, Home, Logout, Preferences, and Help. Below that, there are tabs for Shop, Requisitions, and Receiving. A search bar is present with the text 'Exchange.Oracle.com' and a 'Go' button. The main content area is divided into several sections:

- Stores:** Shows 'Main Store' and 'Exchange.Oracle.com'.
- My Requisitions:** A table with columns: Requisition, Description, Total (USD), Status, Copy, Change, and Receive. It lists several requisitions with their respective descriptions and statuses.
- My Notifications:** A table with columns: Type, From, Subject, and Sent. It lists notifications received from 'MANAGER, CHARLIE' regarding various purchase requisitions.
- Vacation Rules:** A link is highlighted under the 'My Notifications' section, with a tooltip that says 'TIP Vacation Rules - Redirect or auto-respond to notifications.'

At the bottom of the page, there is a footer with copyright information: 'Copyright 2000-2005 Oracle Corporation. All rights reserved.' and a 'Privacy Statement' link.

That takes you to the *Vacation Rules* page.

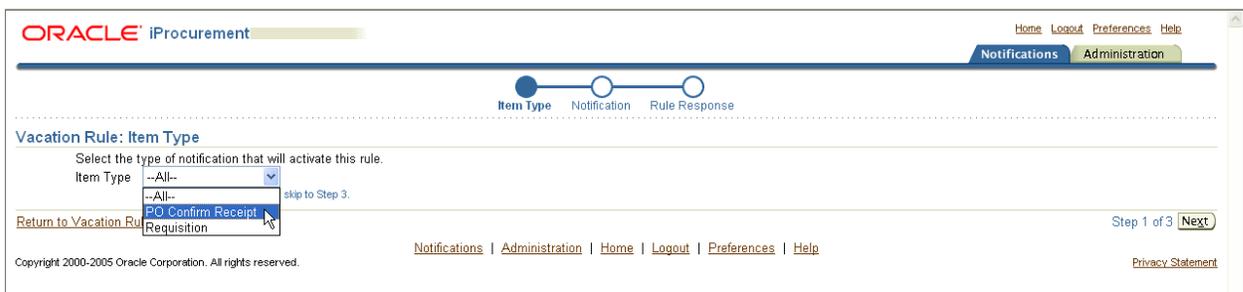


On the *Vacation Rules* page, click on the **Create Rule** button to be guided through the following three steps: (1) Notification Type, (2) Notification Format, and (3) Define Rule.

### Step 1: Item Type



The options displayed will differ based on the rights and privileges assigned to your UserID. This is the page where you can choose what type of Notification Rule you want to create. A Receiver wishing to have another Receiver act in his/her stead should choose **PO Confirm Receipt** from the *Item Type* drop down menu.



Once you have changed the *Item Type*, click on the **Next** button to move on to Step 2: Notification.

### Step 2: Notification

This is the page where you select the format in which the Notification will be sent to the Proxy. This field defaults to the correct format so it should not be changed.

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Home Logout Preferences Help

Notifications Administration

Item Type Notification Rule Response

**Vacation Rule: Notification**

Indicate the notification format that will activate this rule

Item Type **PO Confirm Receipt**

Notification -- You are the designated Receiving Proxy of items on order &PO\_NUMBER

Cancel Back Step 2 of 3 Next

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When you have finished Reviewing this page, click on the **Next** button to continue to Step 3 – Vacation Rule: Rule Response.

### Step 3: Rule Response

IAS provides a number of options to define your Notification Rule. This is where you set the duration of the Notification Rule and what rights you want to give the Receiver who will be acting as your proxy.

ORACLE iProcurement

Home Logout Preferences Help

Notifications Administration

Item Type Notification Rule Response

**Vacation Rule: Response**

\* Indicates required field

Item Type **PO Confirm Receipt**

Notification -- You are the designated Receiving Proxy of items on order &PO\_NUMBER

\* Start Date 11-Dec-2006 15:54:58

End Date

Message

Comments will display with each routed notification

Reassign All Employees and Users

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

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

Respond

Confirm Receipt Action Send Requester Receipt Details

Deliver notifications to me regardless of any general rules

Cancel Back Step 3 of 3 Apply

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Enter in the appropriate information.

### Start Date

This is the date and time you would like your rule to begin. The format for this is DD-MMM-YYYY 00:00:00. For example, April 5, 2006 2:30 pm is expressed as 05-APR-2006 14:30:00.

**Note:** This will default to the current date and time.

**Tip!** You can use the calendar feature for this date, just like the Need-By Date used when creating a Requisition. Simply click on the **Calendar** icon to quickly find a date.

### End Date

This is the date and time you would like your rule to end. The format for this is DD-MMM-YYYY 00:00:00. For example, April 5, 2006 2:30 pm is expressed as 05-APR-2006 14:30:00.

**Tip!** It is highly recommended that users set up an End Date for any Notification rules they create. If there is no End Date, you will have to remove the Notification Rule yourself.

### *Message*

This is the message that the Proxy Receiver will get with each Notification sent out.

### *Reassign*

This option allows you to reassign your notifications to another user to act on your behalf. The first section is where you choose the user who will become your proxy.

**Warning!** When reassigning your receiving notifications to another user, always leave the "All Employees and Users" option in the first drop down menu. Though there is a second option, that functionality is not yet operational.

There are two types of reassignments: (1) Delegate your response and (2) Transfer Notification Ownership.

1. **Delegate your response:** This allows you to have another Receiver work on your behalf, but you will retain the ownership of the document. That way, if there are errors that you need to correct later, you will still be able to find the document.
2. **Transfer notification ownership:** This option allows you to transfer ownership of a document to another user.

**Warning!** If you transfer ownership of a document, you will not be able to work on that document in the future, even after the rule has ended or been removed.

### *Respond*

This option automatically responds to the Notification by sending the Requester the Receipt details. This is the only option in the Respond category.

### *Deliver Notifications to me Regardless of any general rules*

This option allows you to override all previous rules created. This has the same effect as erasing all of the rules.

Once you have updated all the fields appropriately, click on the **Apply** button to complete the rule setup.

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Home Logout Preferences Help

Notifications Administration

Item Type Notification **Rule Response**

**Vacation Rule: Response**

\* Indicates required field

Item Type **PO Confirm Receipt**  
 Notification -- You are the designated Receiving Proxy of items on order &PO\_NUMBER

\* Start Date 11-Dec-2006 15:54:58  
 (example: 11-Dec-2006 15:54:58)

End Date 18-Dec-2006 17:04:39

Message Please receive items for me while I'm on vacation.

Comments will display with each routed notification

Reassign All Employees and Users REQUISITIONER, SEAN

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

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

Respond  
 Confirm Receipt Action Send Requester Receipt Details

Deliver notifications to me regardless of any general rules

Cancel Back Step 3 of 3 Apply

Notifications | Administration | Home | Logout | Preferences | Help

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This will take you to the *Vacation Rules* page where you can see your Rule.

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Home Logout Preferences Help

Notifications Administration

Shop: Stores >

**Vacation Rules**

Create Rule

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: REQUISITIONER, SEAN	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order &PO_NUMBER			Inactive

Return to Worklist

Notifications | Administration | Home | Logout | Preferences | Help

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**Note:** The rule set up in this example has a status of *Inactive* because it was set to start at a later date. If the rule you create is set up to start immediately, it will be listed as *Active*.

**Warning!** Rules can take up to 1 hour to take effect, even if they are set to go into effect immediately.

If you need to update the rule, simply click on the **Pencil** icon  in the *Update* column.

If you need to delete the rule, click on the **Trash Can** icon  in the *Delete* column.

To return to the *Shop* page, click on the **Shop: Stores** link in the top-left corner of the screen.

## Receiving as a Proxy

The next part of this process involves the designated Proxy. To access the Notifications, the Proxy must first log onto IAS. From the *Shop* page, click on the **Requisition Status Tab** which will take you to the *Requisition Status* page. At the *Requisition Status* page, click on the **Notifications** link at the top of the page.

In the following example, the user clicks on the **Full List** button in the *My Notifications* section of the *Shop* page.

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Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Exchange.Oracle.com Go Advanced Search

Stores

Main Store Exchange.Oracle.com

My Requisitions

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
67131	computer monitors	29559.80	Incomplete			
67130	computer monitors	0.00	Cancelled			
67063	laptop	6123.81	Incomplete			
67025	Office Chairs	12500.00	Approved			

My Notifications

Type	From	Subject	Sent
PO Confirm Receipt	REQUISITIONER, DAVE	-- You are the designated Receiving Proxy of items on order AG-3198-P-07-0001	30-Nov-2006
PO Confirm Receipt	REQUISITIONER, DAVE	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0004	30-Nov-2006
PO Confirm Receipt	REQUISITIONER, DAVE	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0003	30-Nov-2006
PO Confirm Receipt	REQUISITIONER, DAVE	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0002	30-Nov-2006

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

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This will take you to the *Requisitions Notifications* page.

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Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop: Stores >

View Open Notifications Go

Select Notifications: Open Reassign

Select All | Select None

Select From	Type	Subject	Sent	Due
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0003	30-Nov-2006	07-Dec-2006
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0004	30-Nov-2006	07-Dec-2006
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-3198-P-07-0001	30-Nov-2006	07-Dec-2006
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0002	30-Nov-2006	07-Dec-2006

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

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You will get notifications for any awarded Requisition the original Receiver had open for Receipt.

Choose the appropriate Notification to match the goods you received. In this case, the items received are associated to with Order Number AG-1358-P-07-0003. Click on the notification link to access the Receiving process.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

View Open Notifications Go

Select Notifications: Open Reassign

Select All | Select None

Select From	Type	Subject	Sent	Due
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0003	30-Nov-2006	07-Dec-2006
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0004	30-Nov-2006	07-Dec-2006
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-3198-P-07-0001	30-Nov-2006	07-Dec-2006
<input type="checkbox"/> REQUISITIONER, DAVE	PO Confirm Receipt	-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0002	30-Nov-2006	07-Dec-2006

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

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This will take you to the *Notification Details* page.

**ORACLE** iProcurement Shopping Cart Home Logout Preferences Help

Requisitions | **Notifications** | Approvals Shop Requisitions Receiving

Requisitions: Notifications >

-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0003 Send Requester Receipt Details Reassign Request Information

From: REQUISITIONER, DAVE  
 To: REQUISITIONER, SEAN  
 Sent: 30-Nov-2006 08:19:41  
 Due: 07-Dec-2006 08:19:41  
 ID: 309829  
 Order Number: AG-1358-P-07-0003  
 Supplier: IBM - 130871985  
 Due Date: 29-DEC-2006  
 Buyer: CONTRACTING OFFICER, ERICA

Note to Receiver

**Items to Receive**

The first 1 of 1 lines are summarized below. Please receive these items on behalf of the requester as indicated below if they have been delivered.

Line	Item Description	Unit	Received	Ordered	Currency	Price	Requisition
1	IBM ThinkPad Laptops for remote employees	EACH	1	4	USD	2500	67064

**You:** have been designated as a proxy to receive these goods. If they have been delivered, please click the **Go to Receiving** link below and receive the items delivered. (If you previously received a partial shipment, enter only the quantity received in the current shipment.) After performing the receipt, click the link to return to this notification and select the **Send Requester Receipt Details** button above if you would like a copy of your receiving actions to go to the requester of these goods (the person who designated you as their proxy) so that they have a record of the actions you performed. **Note:** Once the original requester inactivates/deletes or lets his proxy rule expire, this and other proxy notifications sent to you will be automatically revoked.

[Go To Receiving](#)

**Notification History**

Num	Action Date	Action	From	To	Details
1	30-NOV-2006 08:19:41	Delegate	REQUISITIONER, DAVE	REQUISITIONER, SEAN	Please receive for me

[Return to Worklist](#) Send Requester Receipt Details Reassign Request Information

Display next notification after my response

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To create a Receipt for any items associated with this Award, click on the **Go To Receiving** link underneath the *Items to Receive* section.

**Items to Receive**

The first 1 of 1 lines are summarized below. Please receive these items on behalf of the requester as indicated below if they have been delivered.

Line	Item Description	Unit	Received	Ordered	Currency	Price	Requisition
1	IBM ThinkPad Laptops for remote employees	EACH	1	4	USD	2500	67064

**You:** have been designated as a proxy to receive these goods. If they have been delivered, please click the **Go to Receiving** link below and receive the items delivered. (If you previously received a partial shipment, enter only the quantity received in the current shipment.) After performing the receipt, click the link to return to this notification and select the **Send Requester Receipt Details** button above if you would like a copy of your receiving actions to go to the requester of these goods (the person who designated you as their proxy) so that they have a record of the actions you performed. **Note:** Once the original requester inactivates/deletes or lets his proxy rule expire, this and other proxy notifications sent to you will be automatically revoked.

[Go To Receiving](#)

This will take you to the standard Receiving Process.

ORACLE iProcurement Shopping Cart Home Logout Preferences Help

Shop Requisitions **Receiving**

Select Items    Receipt Information    Review & Submit

---

**Receive Items: Select Items** Cancel Clear Changes Step 1 of 3 Next

Requester

Include employees from all organizations

Requisition Number

Supplier

Order Number

Shipment Number

Items Due  (Enter at least one additional search criterion when selecting Items Due Any Time)

Go Clear

---

Select All | Select None

Select Requisition	Description	Need-By	Unit	Receipt Quantity	Ordered	Received	Supplier	Order Type	Order Number	Shipment Number
<input type="checkbox"/> 67064	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	EACH	<input type="text" value="3"/>	4	1	IBM - 130671985	Purchase	AG-1358-P-07-0003	

TIP Use the Previous/Next navigation tool to make selections across multiple pages

Cancel Clear Changes Step 1 of 3 Next

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Continue through the Receiving Process as previously detailed. If you need to create a full Receipt, refer back to the [Receiving – Simple Receiving](#) section. If you need to create a partial Receipt, refer back to the [Receiving – Complex Receiving](#) section.

There is one final step. When you receive the Confirmation as a proxy receiver, IAS allows you to go back to the *Notification Details* page. Simply click on the **Return to Confirm Receipt Notification** link underneath the confirmation.

ORACLE iProcurement Shopping Cart Home Logout Preferences Help

Shop Requisitions **Receiving**

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**Confirmation**

Receipt 59716 has been created for you.

**Receive Items: Confirmation Details**

**Receipt Information**  
Receipt Date 30-Nov-2006 08:52:34

**Received Item Details**

Receipt Requisition	Description	Receipt Quantity	Unit	Packing Waybill Slip	Transaction Code	Item Comments	Receipt Comments	Supplier
59716 67064	IBM ThinkPad Laptops for remote employees	2	EACH			2 laptops Received by Sean for Dave. Invoice #93285125	2 laptops Received by Sean for Dave. Invoice #93285125	IBM - 130671985

[Return to Confirm Receipt Notification](#)

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This will take you back to the Notification for this Award.

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[Shop](#) [Requisitions](#) [Receiving](#)

-- You are the designated Receiving Proxy of items on order AG-1358-P-07-0003

From REQUISITIONER, DAVE  
 To REQUISITIONER, SEAN  
 Sent 30-Nov-2006 08:19:41  
 Closed 30-Nov-2006 08:54:41  
 ID 309829  
 Order Number AG-1358-P-07-0003  
 Supplier IBM - 130871985  
 Due Date 29-DEC-2006  
 Buyer CONTRACTING OFFICER, ERICA

Note to Receiver

[Items to Receive](#)

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[Go To Receiving](#)

**Notification History**

Num	Action Date	Action	From	To	Details
1	30-NOV-2006 08:19:41	Delegate	REQUISITIONER, DAVE	REQUISITIONER, SEAN	Please receive for me

[Return to Worklist](#)  
 Display next notification after my response

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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You can send the original Receiver a notification that you have received items for him/her. Simply click on the **Send Requester Receipt Details** button at the top or bottom of the notification.

Once the Receiver returns to duty, he/she can view this information in several ways.

From the *Receiving* page, the Requisitioner can search for the Receipt by the **Purchase Order Number**, which is included in the email notification sent by the Proxy Receiver using the *Send Requester Receipt Details* button. Alternatively, the Receiver can go to the *Requisition Details* page and click on the **View Receipts** link that appears over the *Attachments* area.