

NAV210_Workflow Reassignment – Workflow System Administrators**Workflow Reassignment Overview**

In Cardinal, all transactions for Purchase Orders, Vouchers, Journals, and Expenses route for approval via workflow, based on business rules. Sometimes these items may need to be moved from one approver to another by the Workflow System Administrator.

There are three scenarios when items need to be moved:

- Approver is out unexpectedly and items need to be moved to another approver
- Approver plans to be out for an extended period of time and items need to be routed during this time
- In rare cases, if no approver is found that meets the business rules for the transaction, they route for reassignment

In cases where items need to be moved, Cardinal provides a **Workflow Reassignment** page.

Workflow System Administrators use this page to move transactions as needed. Transactions can be moved to any alternate user that is assigned to the Business Unit of the transaction and who has approval role(s) for the transaction. All or any selected transactions can be moved at one time.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

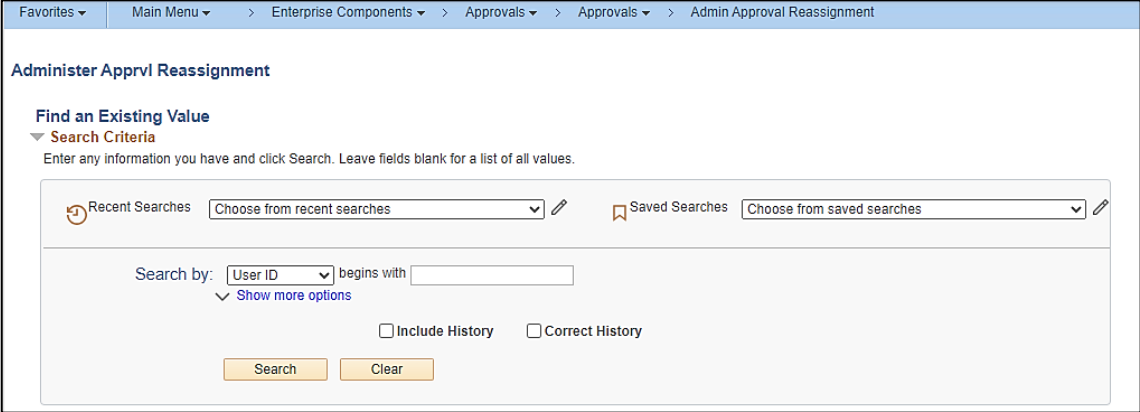

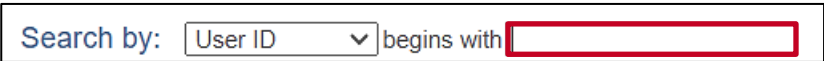

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NAV210_Workflow Reassignment – Workflow System Administrators**Revision History**

Revision Date	Summary of Changes
3/1/2025	Updated the screenshot of the Search pages (Section 1 , after Step 1; Section 2 , after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.

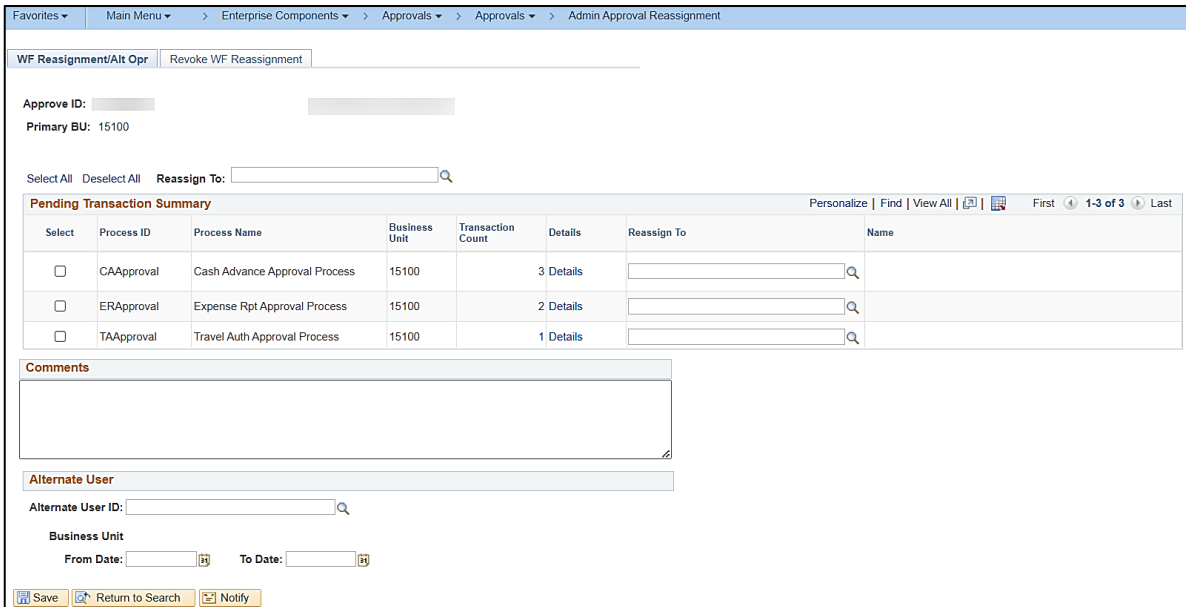
NAV210_Workflow Reassignment – Workflow System Administrators
Reassigning Transactions

Step	Action
1.	Navigate to the Administer Apprvl Reassignment page using the following path: Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment
<p>The Administer Apprvl Reassignment Find an Existing Value page displays.</p> 	
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled “Overview of the Cardinal FIN Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the User ID for the Approver who has items that need to be moved in the Search by field. 
3.	Click the Search button. 

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Step	Action
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The **WF Reassignment/Alt Opr** and **Revoke WF Reassignment** tabs display.



Approve ID:

Primary BU: 15100

Select All Deselect All Reassign To:

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100		3 Details	<input type="text"/>	
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	<input type="text"/>	
<input type="checkbox"/>	TAApApproval	Travel Auth Approval Process	15100		1 Details	<input type="text"/>	

Comments

Alternate User

Alternate User ID:

Business Unit

From Date: To Date:

Save Return to Search Notify



This page has a section to enter an Alternate User (Approver) for future dated items.

For this scenario, an item is being reassigned, so the **WF Reassignment/Alt Opr** tab is used. This approver has pending Expense, Cash Advance, and Travel Authorization related items on their **Worklist**.

- If all transactions need to be moved to one approver, enter or search for that approver's name in the **Reassign To** field (**Header** section). Once the name is entered, it populates in the **Reassign To** field next to each process.

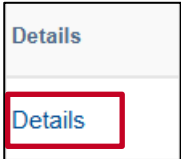
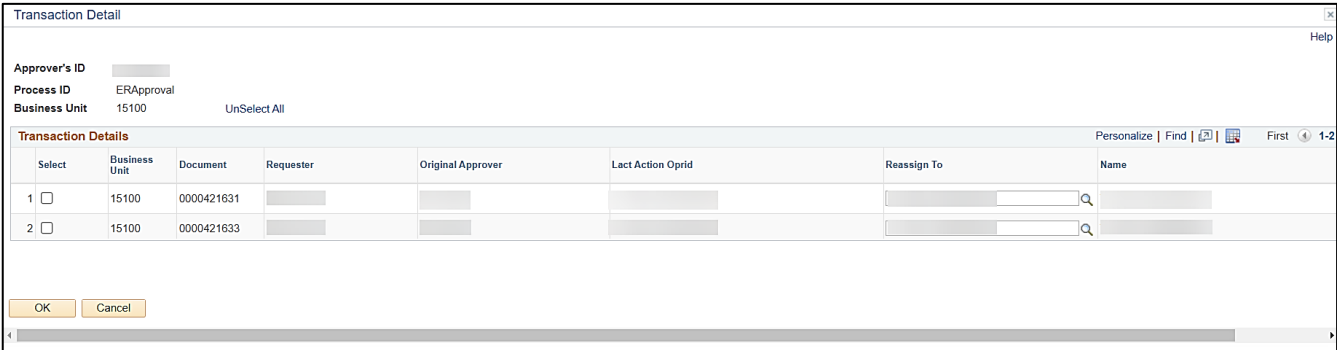




Select All Deselect All Reassign To:

- To assign items to different approvers, leave the **Reassign To** field in the **Header** blank and enter or select different names for each process in the **Reassign To** field next to that process.

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100		3 Details	<input type="text"/>	

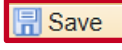
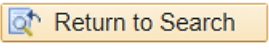
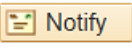


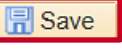
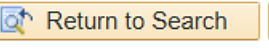
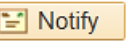

NAV210_Workflow Reassignment – Workflow System Administrators

Step	Action																		
6.	<p>Click the Select checkbox next to the Process to which changes need to be made. For this scenario, Expense Reports is selected. There are two Expense Reports on this worklist.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Process ID</th> <th>Process Name</th> <th>Business Unit</th> <th>Transaction Count</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CAApproval</td> <td>Cash Advance Approval Process</td> <td>15100</td> <td></td> <td>3 Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>ERApproval</td> <td>Expense Rpt Approval Process</td> <td>15100</td> <td></td> <td>2 Details</td> </tr> </tbody> </table>	Select	Process ID	Process Name	Business Unit	Transaction Count	Details	<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100		3 Details	<input checked="" type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details
Select	Process ID	Process Name	Business Unit	Transaction Count	Details														
<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100		3 Details														
<input checked="" type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details														
7.	<p>Click the Details link for the selected process.</p> 																		
<p>The Transaction Detail page displays in a pop-up window for the selected process.</p> 																			
	<p>All transactions have been automatically populated with the approver's name entered on the WF Reassignment/Alt Opr tab.</p> <p>If all transactions need to be moved, proceed to step 10.</p>																		
8.	<p>If the user wants to select specific transactions to be moved, click the UnSelect All link to uncheck all transactions.</p> 																		

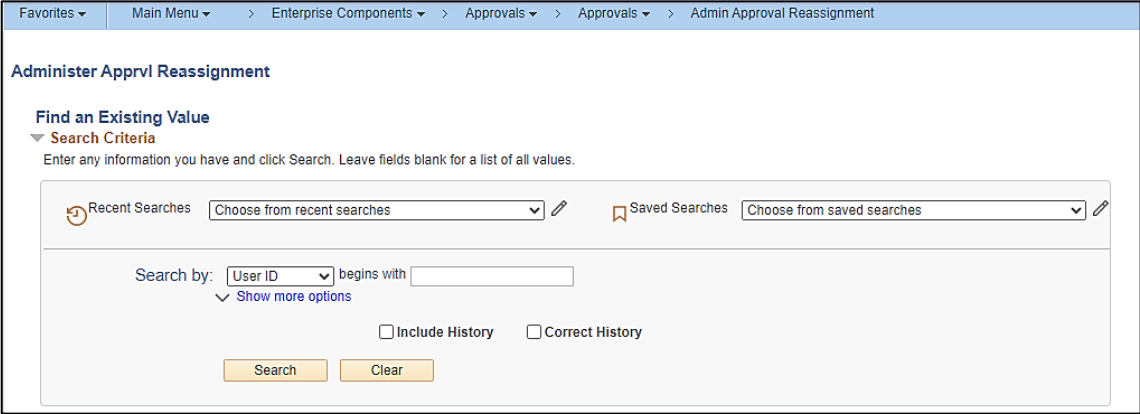

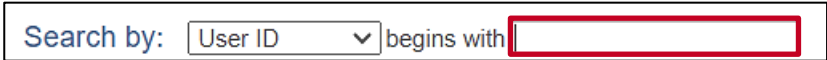

NAV210_Workflow Reassignment – Workflow System Administrators

Step	Action																																
9.	<p>Select the transactions that need to be reassigned by clicking the corresponding Select checkbox option(s).</p> <div data-bbox="256 451 565 630" style="border: 1px solid black; padding: 5px;"> <p>Transaction Details</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Business Unit</th> </tr> </thead> <tbody> <tr> <td>1 <input type="checkbox"/></td> <td>15100</td> </tr> </tbody> </table> </div>	Select	Business Unit	1 <input type="checkbox"/>	15100																												
Select	Business Unit																																
1 <input type="checkbox"/>	15100																																
10.	<p>Click the OK button to reassign the selected transaction.</p> <div data-bbox="256 718 587 802" style="border: 1px solid black; padding: 5px;"> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>																																
<p>The WF Reassignment/Alt Opr tab redisplay.</p>																																	
<div data-bbox="186 892 1453 1533" style="border: 1px solid black; padding: 5px;"> <p>Navigation: Favorites > Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment</p> <p>WF Reassignment/Alt Opr Revoke WF Reassignment</p> <p>Approve ID: [] []</p> <p>Primary BU: 15100</p> <p>Select All Deselect All Reassign To: []</p> <p>Pending Transaction Summary Personalize Find View All [] [] First 1-3 of 3 Last</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Process ID</th> <th>Process Name</th> <th>Business Unit</th> <th>Transaction Count</th> <th>Details</th> <th>Reassign To</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CAApproval</td> <td>Cash Advance Approval Process</td> <td>15100</td> <td>3</td> <td>Details</td> <td>[]</td> <td>[]</td> </tr> <tr> <td><input type="checkbox"/></td> <td>ERApproval</td> <td>Expense Rpt Approval Process</td> <td>15100</td> <td>2</td> <td>Details</td> <td>[]</td> <td>[]</td> </tr> <tr> <td><input type="checkbox"/></td> <td>TAApapproval</td> <td>Travel Auth Approval Process</td> <td>15100</td> <td>1</td> <td>Details</td> <td>[]</td> <td>[]</td> </tr> </tbody> </table> <p>Comments</p> <p>[]</p> <p>Alternate User</p> <p>Alternate User ID: []</p> <p>Business Unit</p> <p>From Date: [] To Date: []</p> <p>[Save] [Return to Search] [Notify]</p> </div>		Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name	<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100	3	Details	[]	[]	<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	2	Details	[]	[]	<input type="checkbox"/>	TAApapproval	Travel Auth Approval Process	15100	1	Details	[]	[]
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name																										
<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100	3	Details	[]	[]																										
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	2	Details	[]	[]																										
<input type="checkbox"/>	TAApapproval	Travel Auth Approval Process	15100	1	Details	[]	[]																										
11.	<p>Enter any applicable notes in the Comments section of the page. Comments are required. Generally, this is copied from the email request received to move the transaction(s).</p> <div data-bbox="267 1659 1315 1837" style="border: 1px solid black; padding: 5px;"> <p>Comments</p> <p>[]</p> </div>																																

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Step	Action
12.	Click the Save button. <div data-bbox="266 422 831 493" style="border: 1px solid black; padding: 5px; margin-top: 10px;">    </div>
If a comment is not entered, an error message will display. <div data-bbox="402 583 1230 829" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p style="color: blue; margin: 0;">Message</p> <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> <p style="margin: 0;">Comment is required when reassigning a pending transaction (25013,1)</p> <div style="text-align: center; margin-top: 10px;">  </div> </div>	
13.	Click the OK button. <div data-bbox="259 919 454 1003" style="border: 1px solid black; padding: 5px; margin-top: 10px;">  </div>
14.	Enter the required comment in the Comments section. <div data-bbox="259 1092 1230 1264" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="margin: 0;">Comments</p> <div style="border: 2px solid red; height: 50px; width: 100%;"></div> </div>
16.	Click the Save button again. <div data-bbox="259 1354 824 1423" style="border: 1px solid black; padding: 5px; margin-top: 10px;">    </div>
	The transaction has been successfully reassigned to the defined approver.

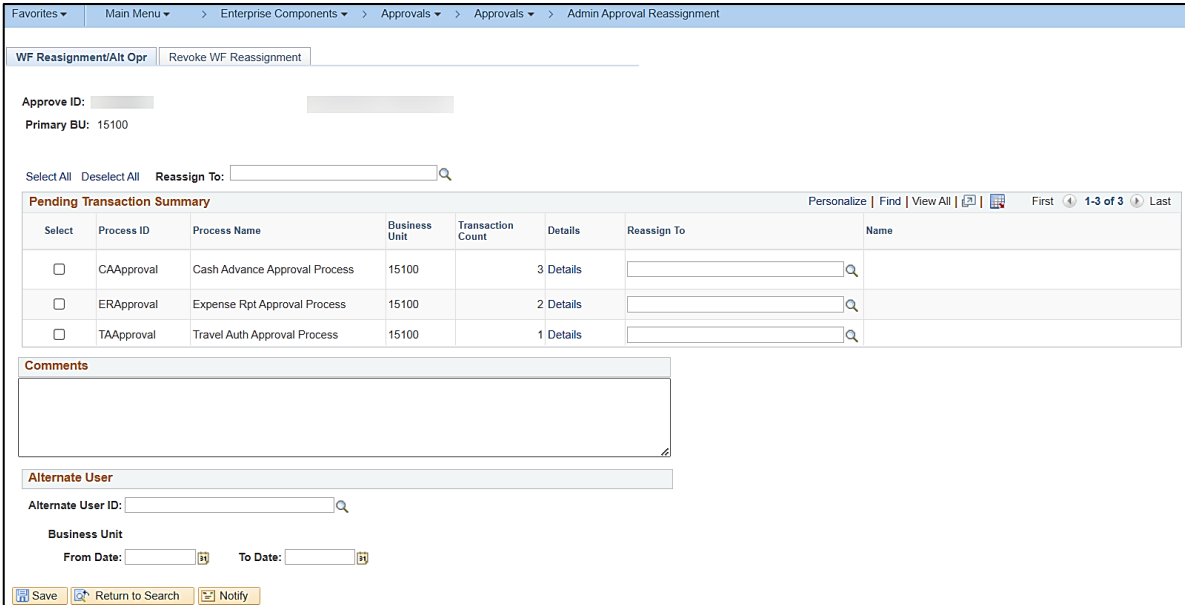
NAV210_Workflow Reassignment – Workflow System Administrators
Revoking Assigned Transactions

Step	Action
1.	Navigate to the Administer Apprvl Reassignment page using the following path: Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment
<p>The Administer Apprvl Reassignment Find an Existing Value page displays.</p> 	
	<p>For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled “Overview of the Cardinal FIN Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
2.	<p>Enter the User ID for the Approver who has items that were moved and need to be revoked in the Search by field.</p> 
3.	<p>Click the Search button.</p> 

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Step	Action
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The **WF Reassignment/Alt Opr** and **Revoke WF Reassignment** tabs display.



Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment

WF Reassignment/Alt Opr | Revoke WF Reassignment

Approve ID:
 Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary							Personalize Find View All	First 1-3 of 3 Last
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name	
<input type="checkbox"/>	CAApproval	Cash Advance Approval Process	15100		3 Details	<input type="text"/>		
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	<input type="text"/>		
<input type="checkbox"/>	TAApapproval	Travel Auth Approval Process	15100		1 Details	<input type="text"/>		

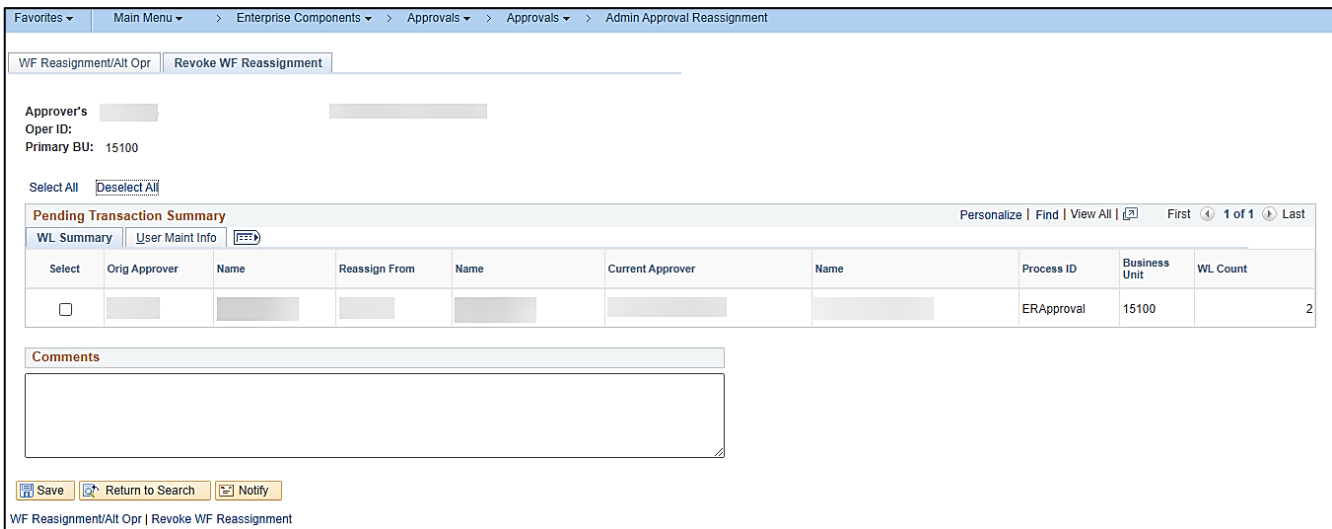
Comments

Alternate User
 Alternate User ID:
 Business Unit
 From Date: To Date:

4. Click the **Revoke WF Reassignment** tab.



The **Revoke WF Reassignment** tab displays.



Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment

WF Reassignment/Alt Opr | Revoke WF Reassignment

Approver's
 Oper ID:
 Primary BU: 15100




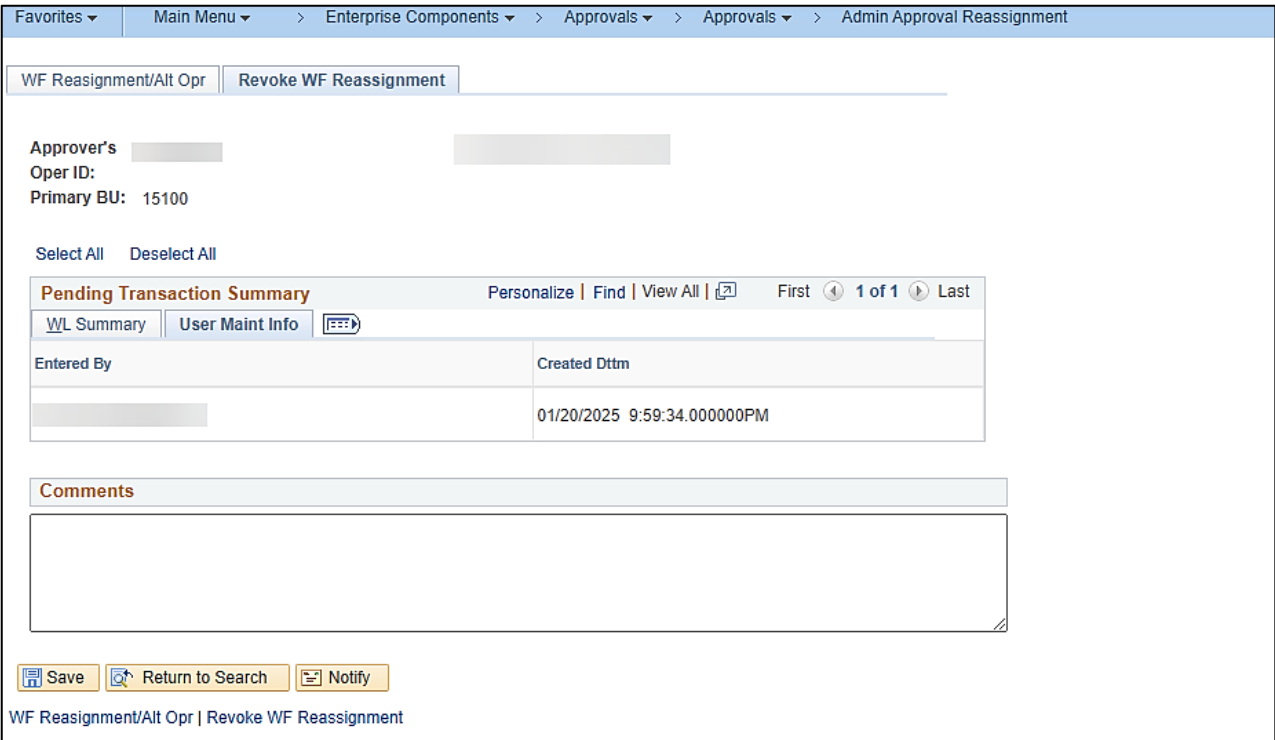

Select All Deselect All

Pending Transaction Summary										Personalize Find View All	First 1 of 1 Last
Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count		
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	ERApproval	15100	2		

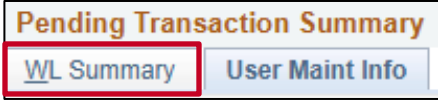
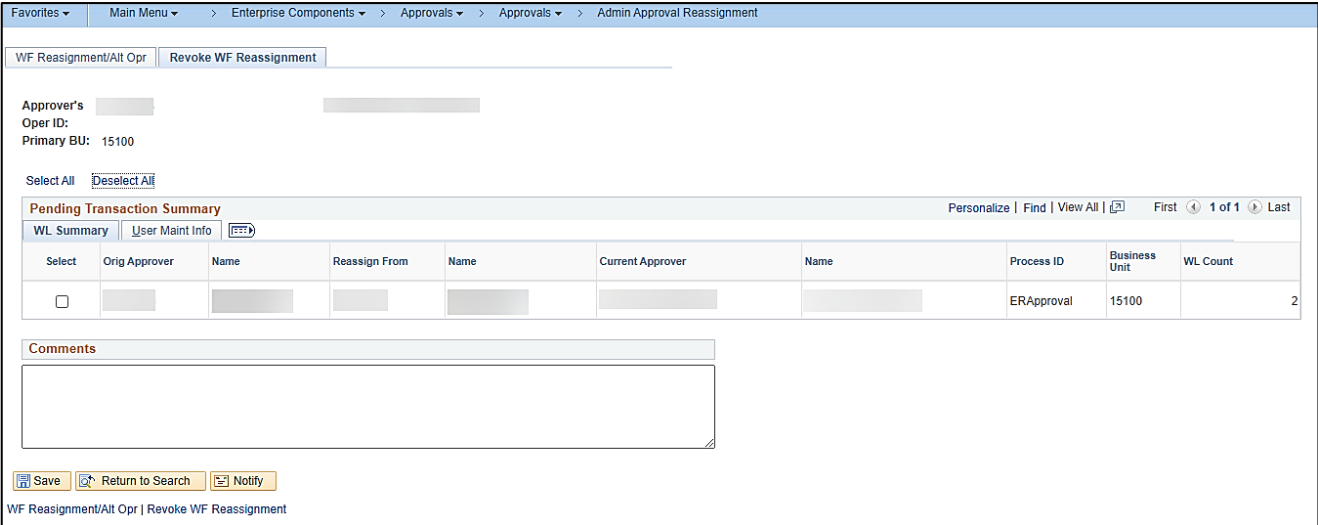
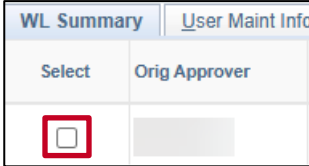

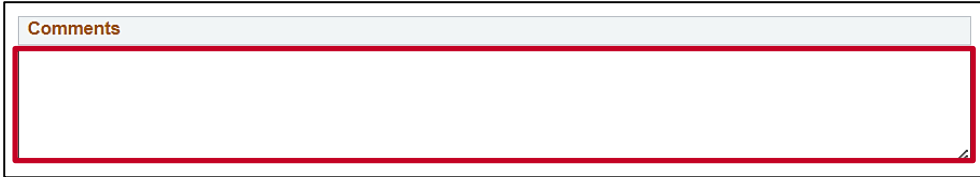
Comments

WF Reassignment/Alt Opr | Revoke WF Reassignment

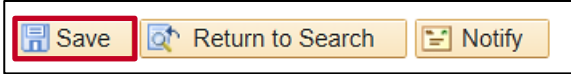
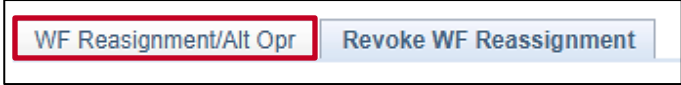
NAV210_Workflow Reassignment – Workflow System Administrators

Step	Action														
	<p>There are two tabs visible under the Pending Transaction Summary section: WL Summary and User Maint Info.</p>  <p>The default tab is the WL Summary tab. It displays a summary of workflow processes that have been reassigned. It shows the name of the approver from whom it was reassigned (Reassign From field), the current approver (Current Approver field) to whom the transaction(s) were reassigned, and the process that was reassigned (Process ID field).</p> <table border="1" data-bbox="256 709 1469 802"> <thead> <tr> <th>Orig Approver</th> <th>Name</th> <th>Reassign From</th> <th>Name</th> <th>Current Approver</th> <th>Name</th> <th>Process ID</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>ERApproval</td> </tr> </tbody> </table>	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID							ERApproval
Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID									
						ERApproval									
5.	<p>Click the User Maint Info tab.</p> 														
<p>The User Maint Info tab displays.</p> 															
	<p>This tab allows the user to view previous transaction reassignment data. It includes the User ID of the person that entered the reassignment and the date and time it was created.</p>														

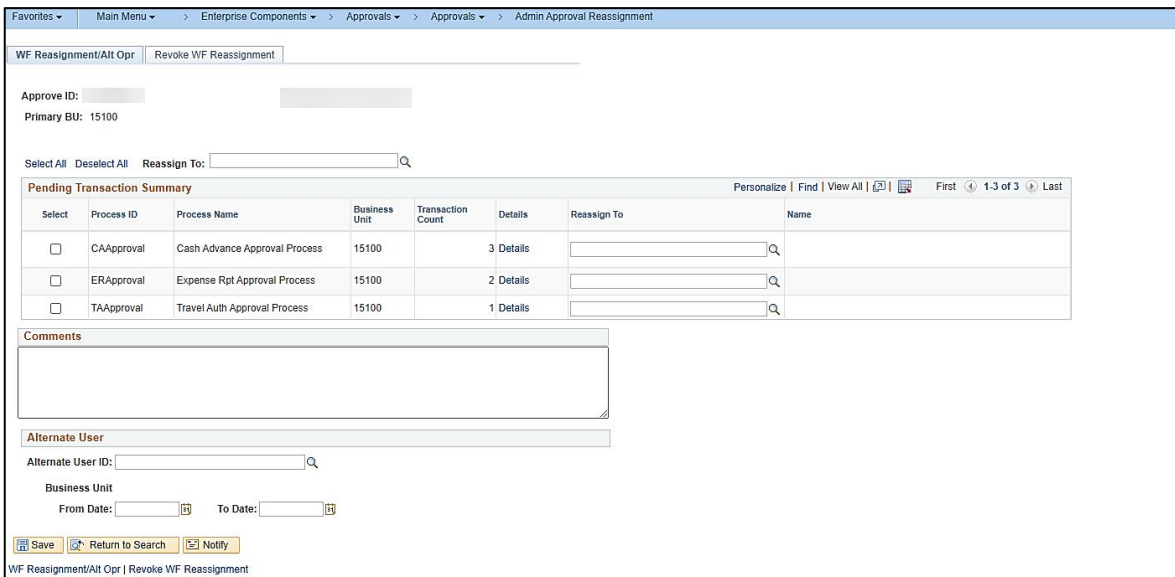
NAV210_Workflow Reassignment – Workflow System Administrators

Step	Action
6.	<p>Click the WL Summary tab.</p> 
	<p>The WL Summary tab redispays.</p> 
7.	<p>Click the Select checkbox option for the Process to be revoked.</p> 
8.	<p>If the user wants to revoke all processes, click the Select All link.</p> 
9.	<p>Enter an appropriate comment in the Comments section.</p> 

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Step	Action
10.	Click the Save button. 
11.	The selected process(es) are removed from the list. Click the WF Reassignment/Alt Opr tab. 

The **WF Reassignment/Alt Opr** tab displays.



The screenshot shows the 'WF Reassignment/Alt Opr' tab interface. At the top, there are navigation tabs: 'WF Reassignment/Alt Opr' (selected) and 'Revoke WF Reassignment'. Below the tabs, there are input fields for 'Approve ID' and 'Primary BU: 15100'. A 'Reassign To:' field with a search icon is also present. The main section is titled 'Pending Transaction Summary' and contains a table with columns: Select, Process ID, Process Name, Business Unit, Transaction Count, Details, Reassign To, and Name. The table lists three transactions: CAApproval (Cash Advance Approval Process), ERApproval (Expense Rpt Approval Process), and TAApapproval (Travel Auth Approval Process). Below the table is a 'Comments' section with a text area. Further down, there is an 'Alternate User' section with an 'Alternate User ID:' field and a 'Business Unit' section with 'From Date:' and 'To Date:' fields. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons. The footer of the interface shows 'WF Reassignment/Alt Opr | Revoke WF Reassignment'.



The transaction is successfully revoked.