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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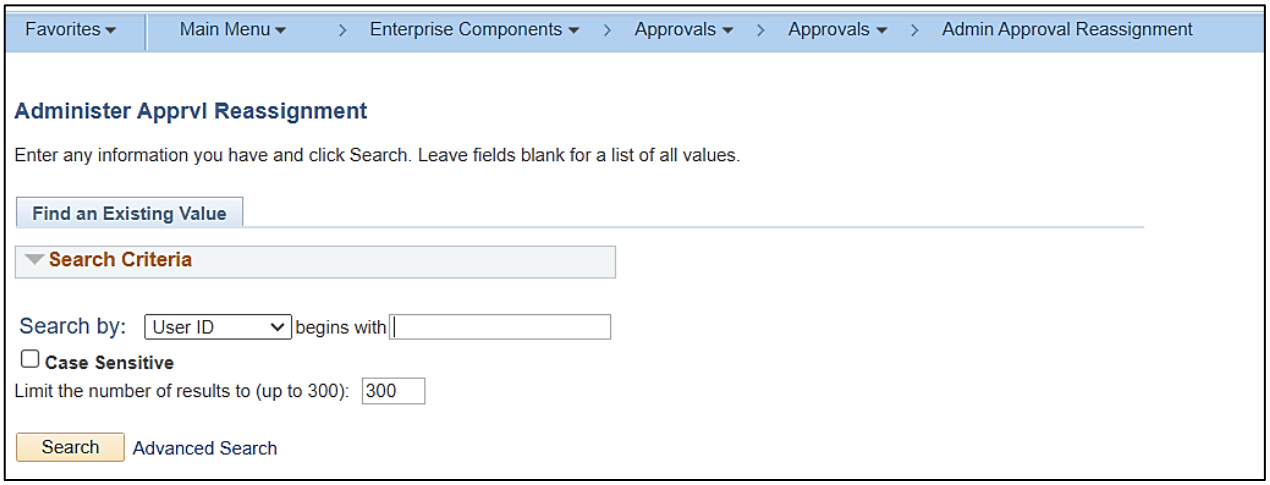
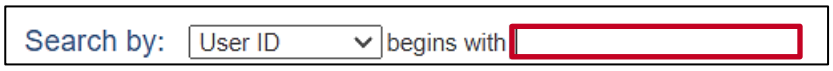
Reassigning Transactions

Step	Action
1.	Navigate to the **Administer Apprvl Reassignment** page using the following path: **Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment**

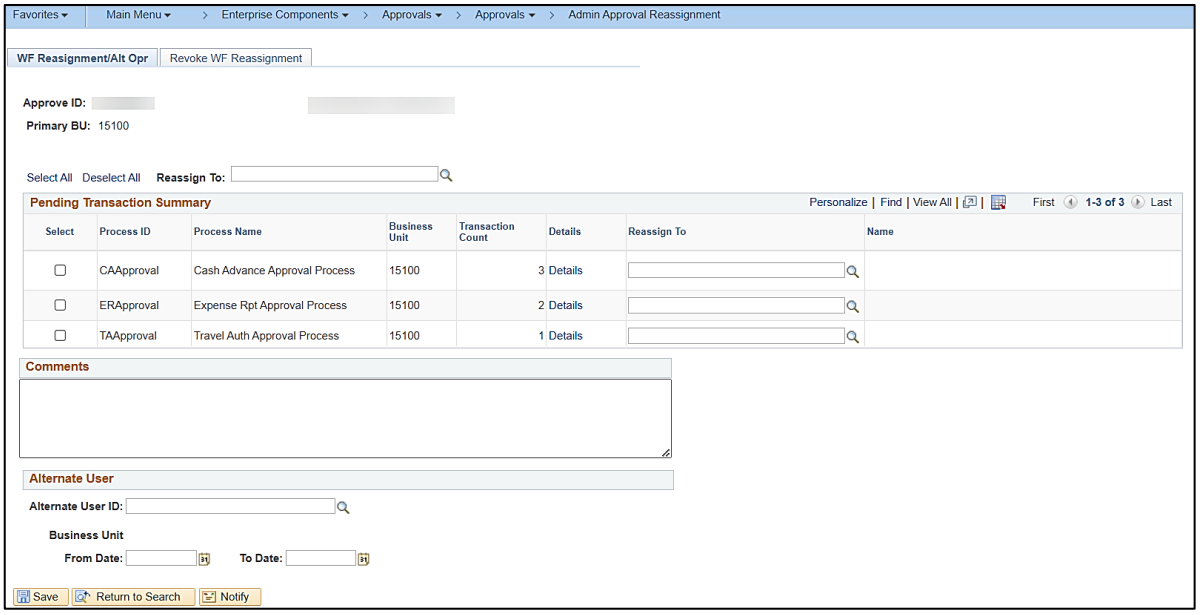
The **Administer Apprvl Reassignment Search** page displays.

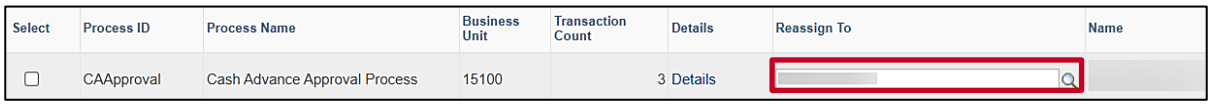


2.	Enter the User ID for the Approver who has items that need to be moved in the **Search by** field. 
3.	Click the **Search** button.

Step	Action

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

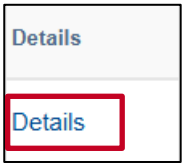


	This page has a section to enter an Alternate User (Approver) for future dated items. For this scenario, an item is being reassigned, so the **WF Reassignment/Alt Opr** tab is used. This approver has pending Expense, Cash Advance, and Travel Authorization related items on their **Worklist**.
4.	If all 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.
5.	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. 

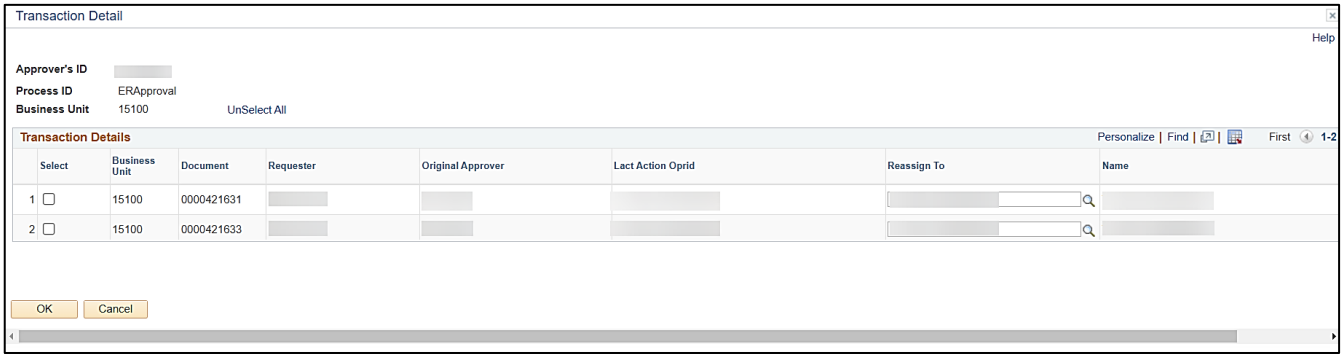
Step	Action
6.	Click the **Select** checkbox next to the Process to which changes need to be made. For this scenario, Expense Reports is selected. There are two Expense Reports on this worklist.

Select	Process ID	Process Name	Business Unit	Transaction Count	Details
☐	CAApproval	Cash Advance Approval Process	15100	3	Details
☐	ERApproval	Expense Rpt Approval Process	15100	2	Details

Step	Action
7.	Click the **Details** link for the selected process.



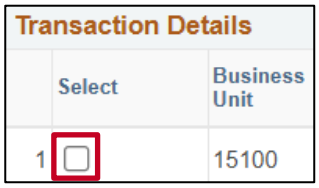
The **Transaction Detail** page displays in a pop-up window for the selected process.



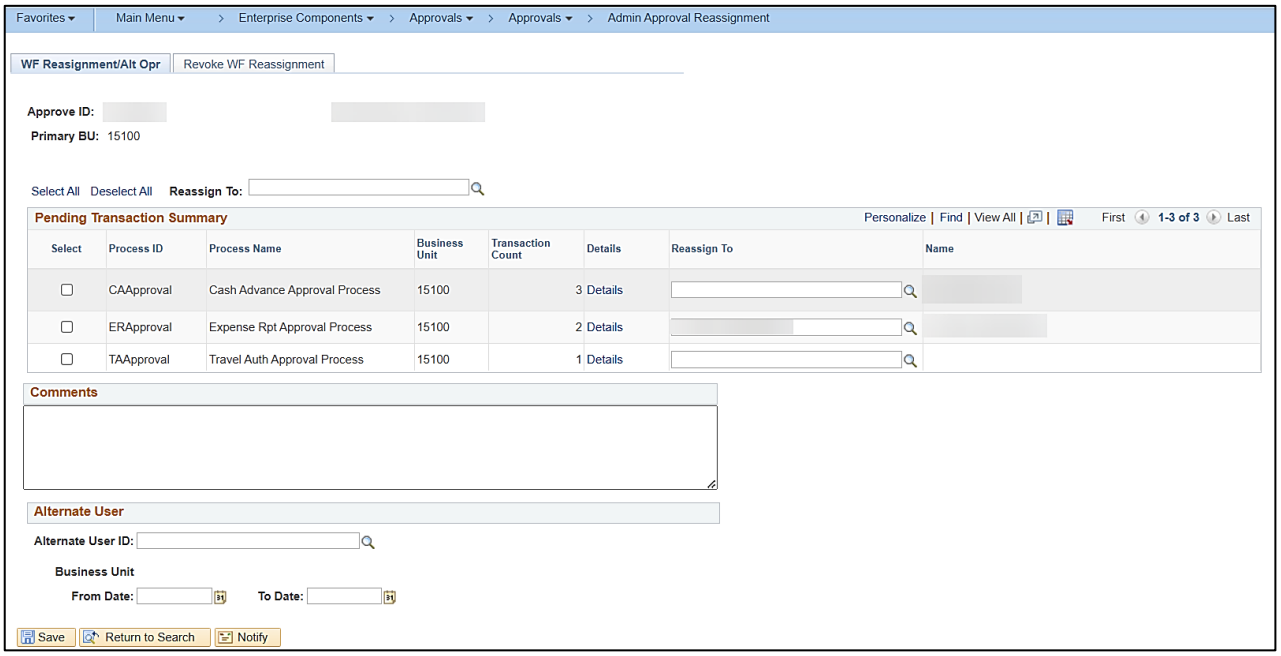
All transactions have been automatically populated with the approver's name entered on the **WF Reassignment/Alt Opr** tab.

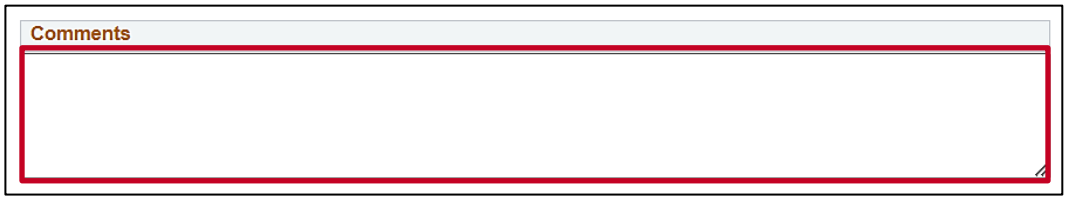
If all transactions need to be moved, proceed to step 10.

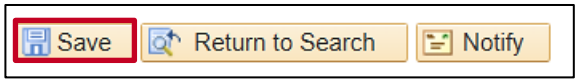
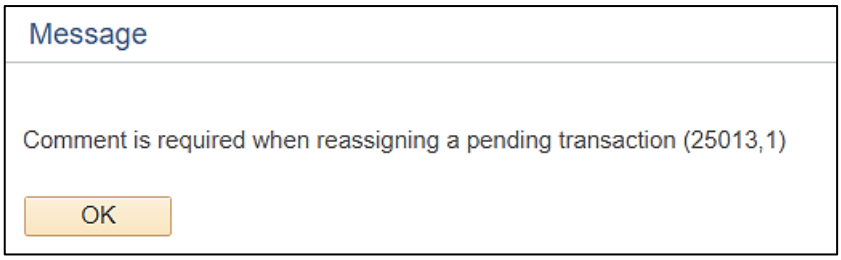
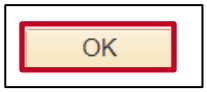
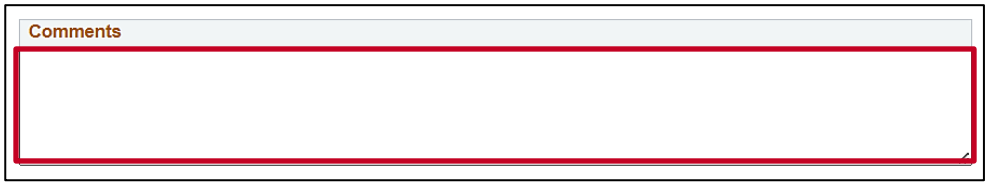
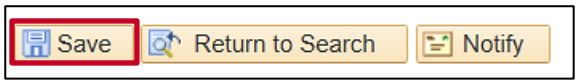
Step	Action
8.	If the user wants to select specific transactions to be moved, click the **UnSelect All** link to uncheck all transactions.

Step	Action
9.	Select the transactions that need to be reassigned by clicking the corresponding **Select** checkbox option(s). 
10.	Click the **OK** button to reassign the selected transaction.

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



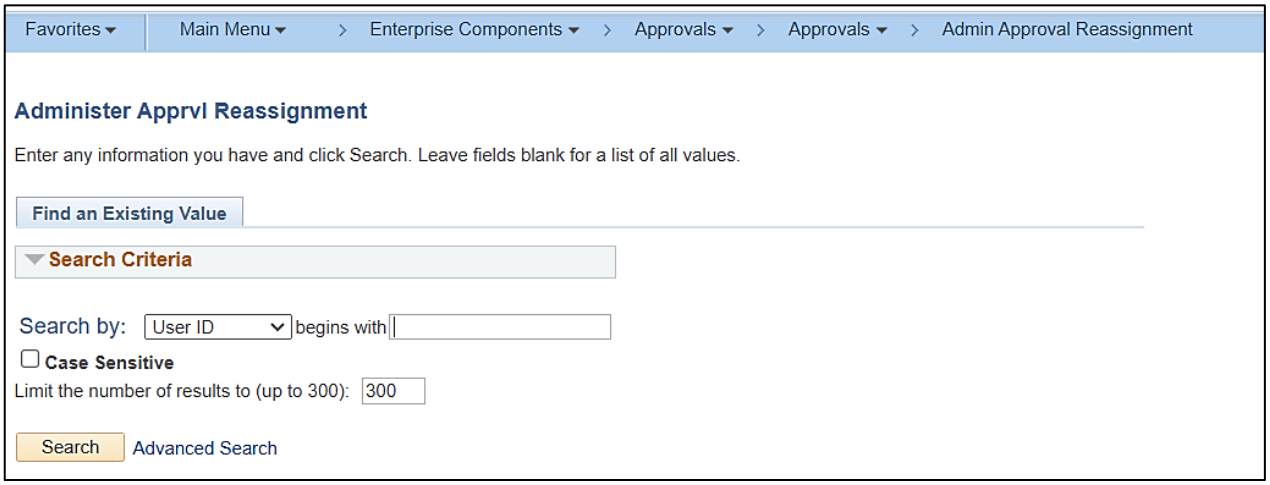
11.	Enter any applicable notes in the **Comments** section of the page. Comments are required. Generally, this is copied from the email request received to move the transaction(s). 

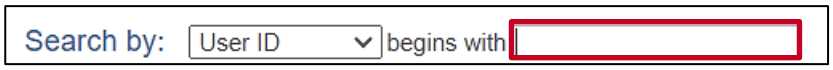
Step	Action
12.	Click the **Save** button. 
If a comment is not entered, an error message will display. 	
13.	Click the **OK** button. 
14.	Enter the required comment in the **Comments** section. 
16.	Click the **Save** button again. 
	The transaction has been successfully reassigned to the defined approver.

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**

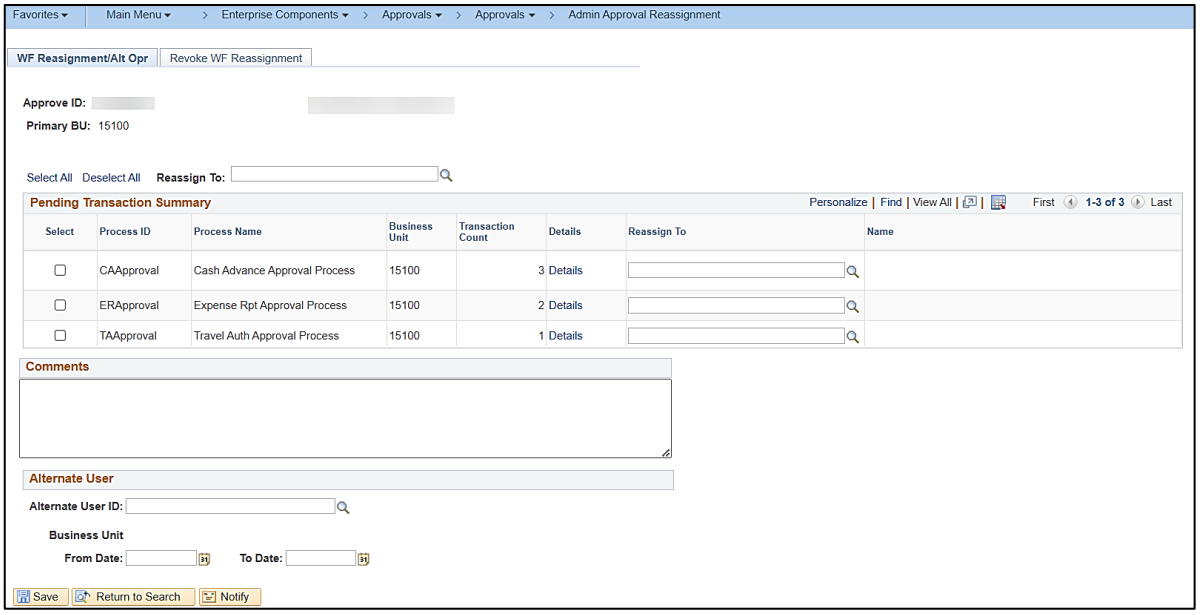
The **Administer Apprvl Reassignment Search** page displays.



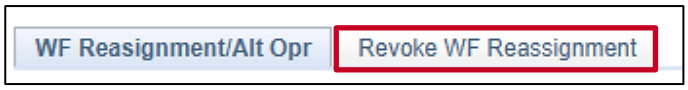
2.	Enter the User ID for the Approver who has items that were moved and need to be revoked in the **Search by** field. 
3.	Click the **Search** button.

Step	Action

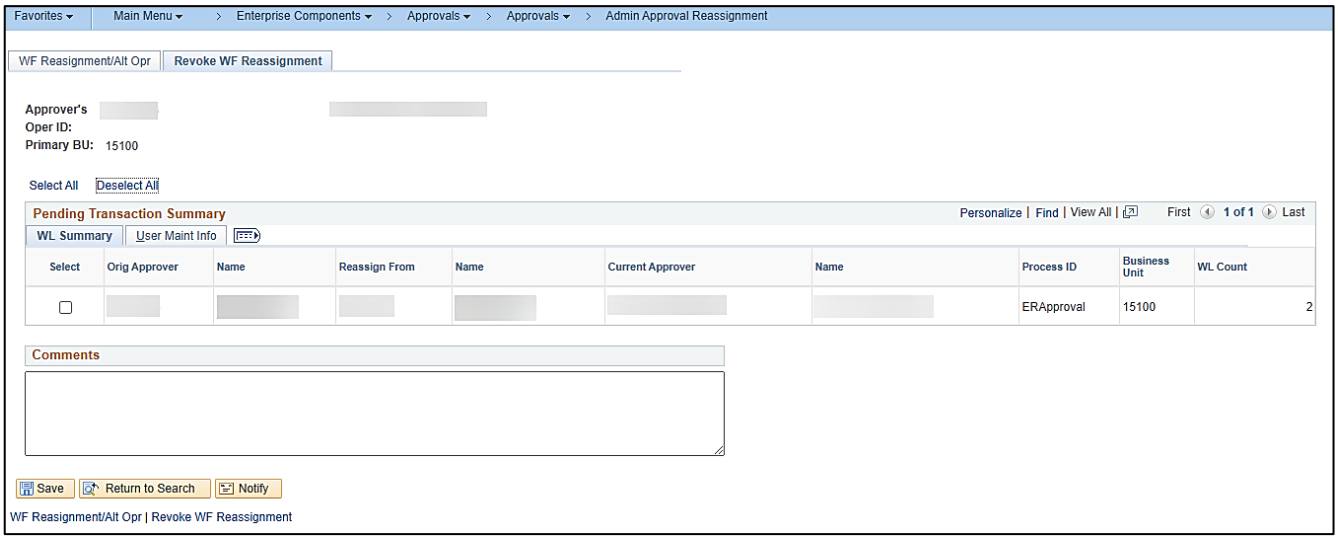
The **WF Reassignment/Alt Opr and Revoke WF Reassignment** tabs display.

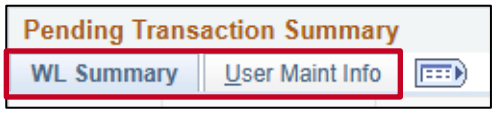
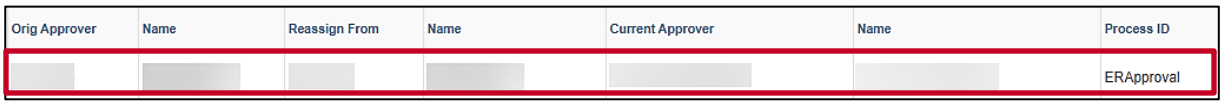
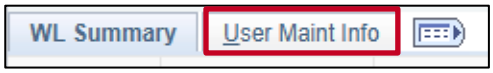


4. Click the **Revoke WF Reassignment** tab.

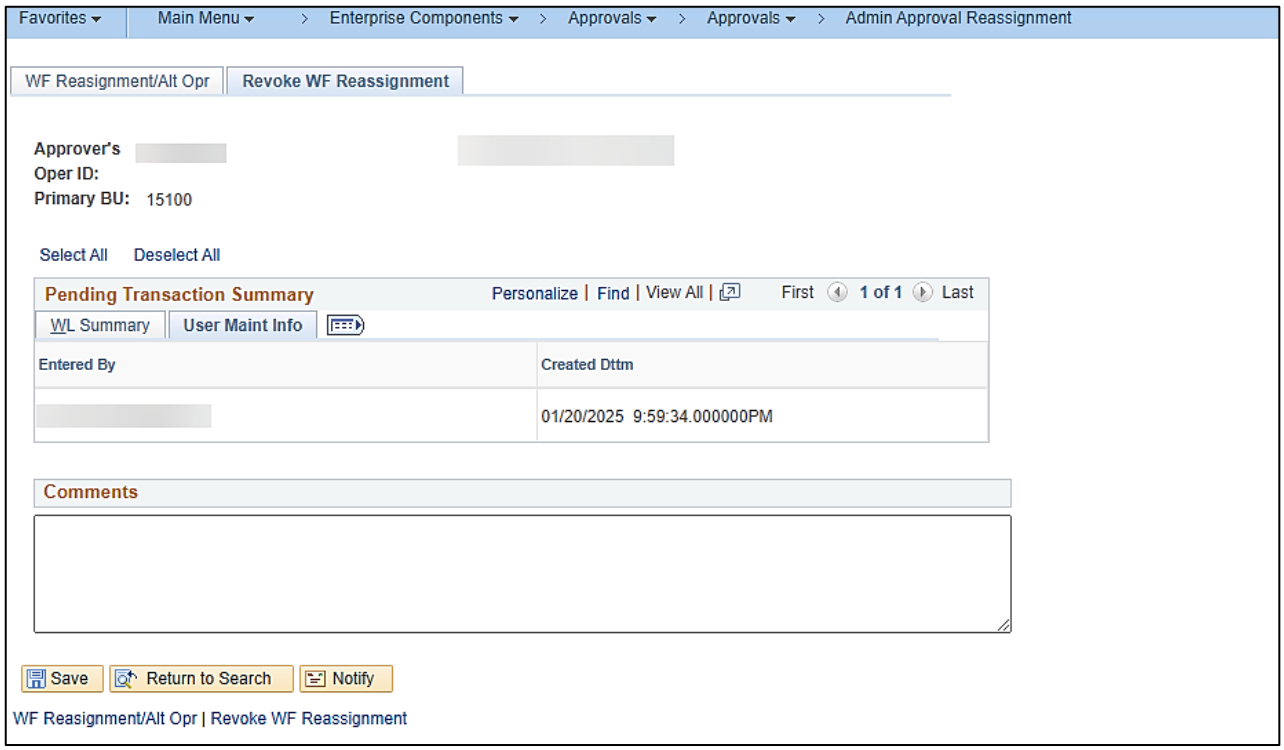


The **Revoke WF Reassignment** tab displays.

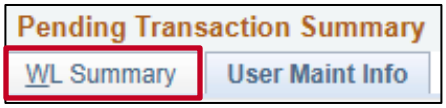
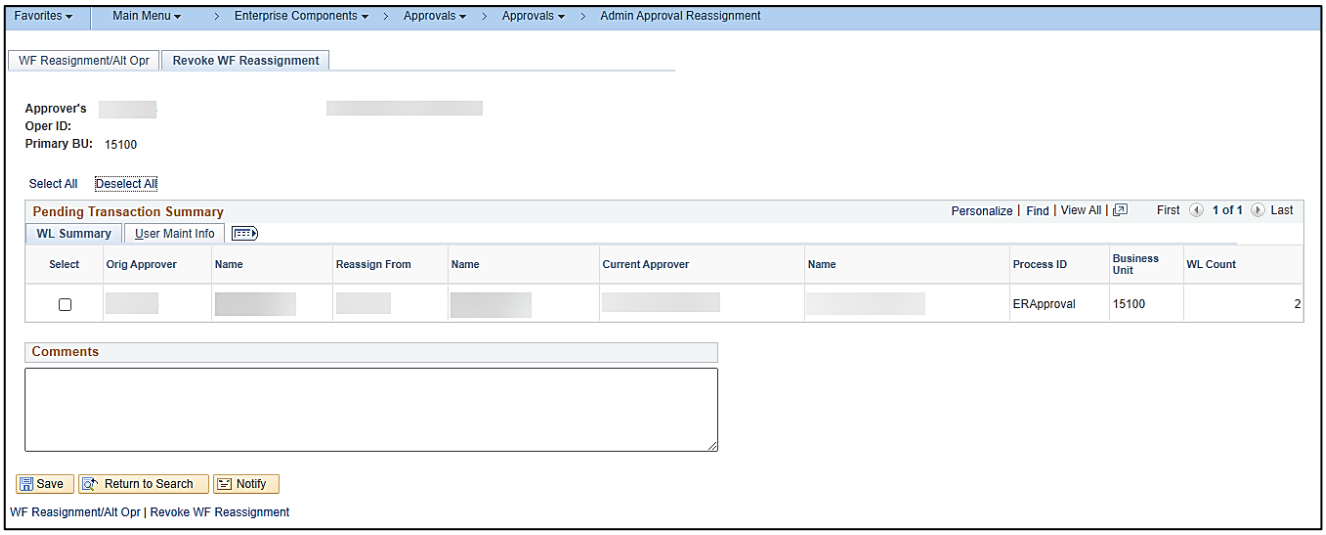
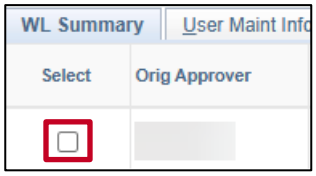
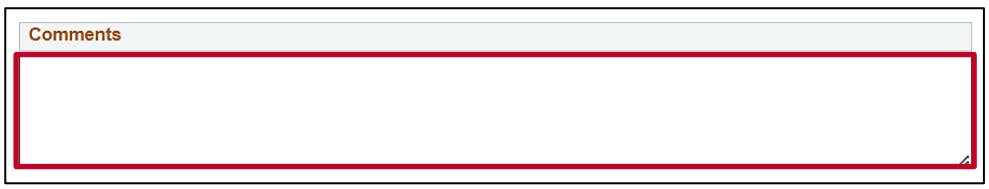


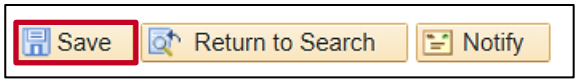
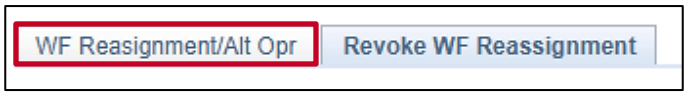
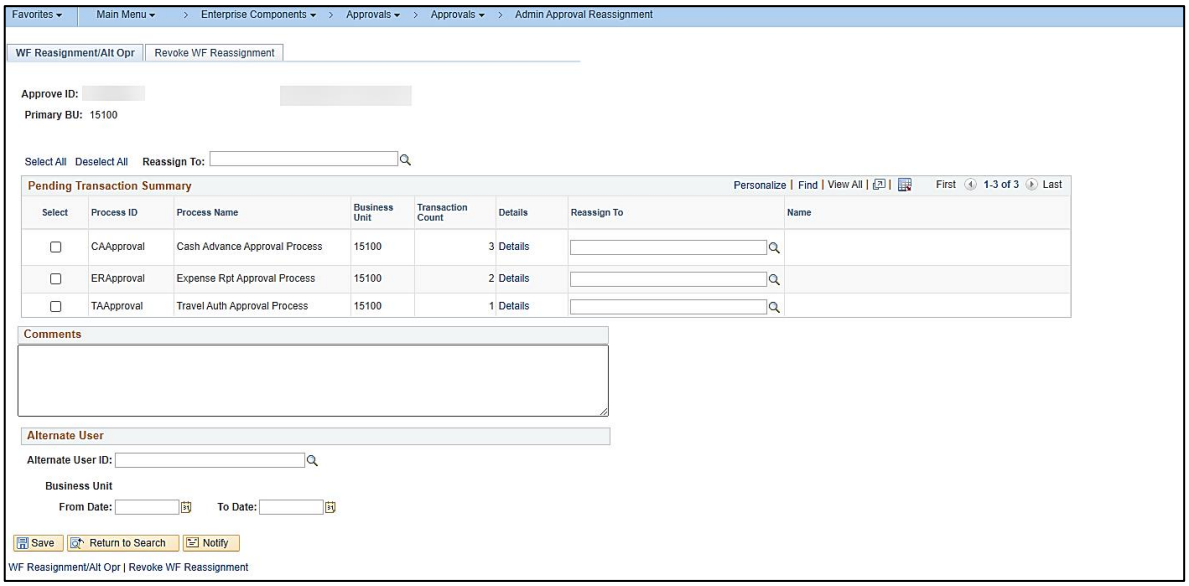
Step	Action
	There are two tabs visible under the **Pending Transaction Summary** section: **WL Summary** and **User Maint Info**.  The default tab is the **WL Summary** tab. It displays a summary of workflow processes that have been reassigned. It shows the name of the approver from whom it was reassigned (**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). 
5.	Click the **User Maint Info** tab. 

The **User Maint Info** tab displays.



	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.

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

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 transaction is successfully revoked.