



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 two scenarios when items need to be moved:

- Approver is out unexpectedly and specific items need to be moved to another approver
- In rare cases, if no approver is found that meets the business rules for the transaction, the transaction routes to the Workflow Administrator for reassignment

Note: For any request where the approver wants a delegation to be submitted on their behalf for an extended period of time, the Workflow Administrator must submit a Help Desk ticket (vccc@vita.virginia.gov) with “Cardinal” in the Subject Line. The request should include the approver’s User ID, the specific transaction(s) (e.g., Vouchers, Expense Reports) that need to be routed, and the specific dates.

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 approver that is assigned to the Business Unit of 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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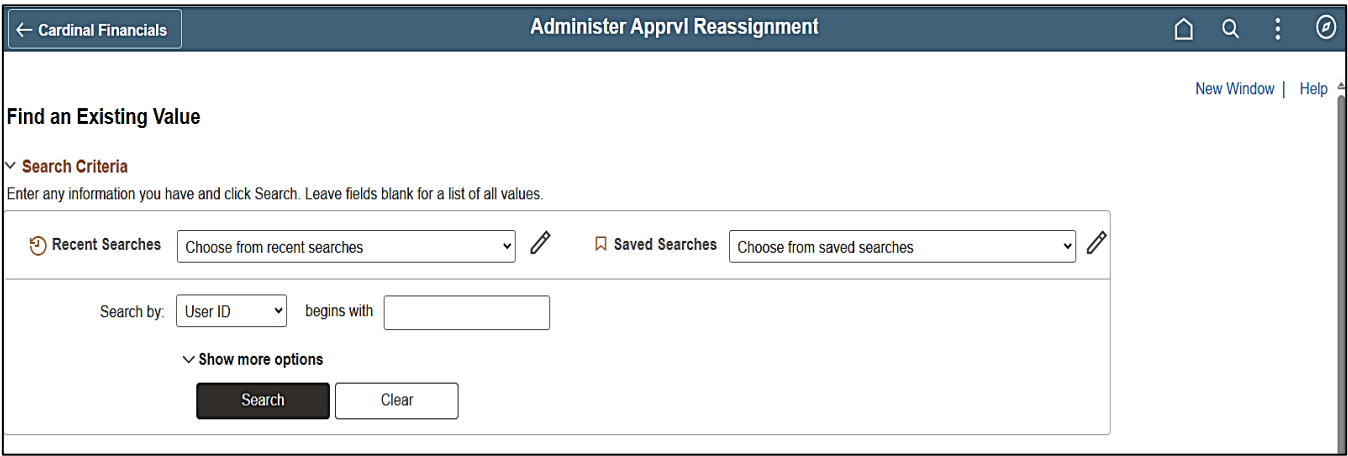
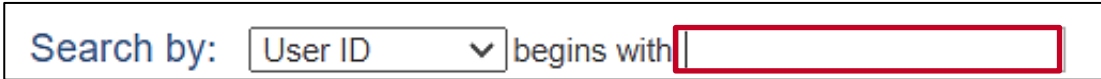
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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshot of the Search pages. Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.

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Reassigning Transactions

Step	Action
1.	Navigate to the Administer Apprvl Reassignment page using the following path: NavBar > Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment The Administer Apprvl Reassignment Find an Existing Value Search page displays. 
	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** page displays by default.

Cardinal Financials Admin Approval Reassignment

WF Reassignment Revoke WF Reassignment

Approve ID: []

Primary BU: 15100

Select All Deselect All Reassign To: []

Pending Transaction Summary

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
☐	ERApproval	Expense Rpt Approval Process	15100	5	Details	[]	
☐	TAApapproval	Travel Auth Approval Process	15100	2	Details	[]	
☐	VoucherApproval	Voucher Approvals	15100	1	Details	[]	

Comments

[]

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** tab is used.

4.

If All Transactions will be reassigned to another approver proceed to **Step 5**.
If specific transactions will be routed to different approvers, proceed to **Step 6**.

5.

Enter or search for the approver's name who will receive the reassigned transactions in the **Reassign To** field in the header section.

Approve ID: [] APPROVER, SUPERVISOR

Primary BU: 15100

Select All Deselect All Reassign To: [] CAR, RACE



Once the name is entered, it populates in the **Reassign To** field next to each process.

Pending Transaction Summary

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
☐	ERApproval	Expense Rpt Approval Process	15100	5	Details	[]	CAR, RACE
☐	TAApapproval	Travel Auth Approval Process	15100	2	Details	[]	CAR, RACE
☐	VoucherApproval	Voucher Approvals	15100	1	Details	[]	CAR, RACE



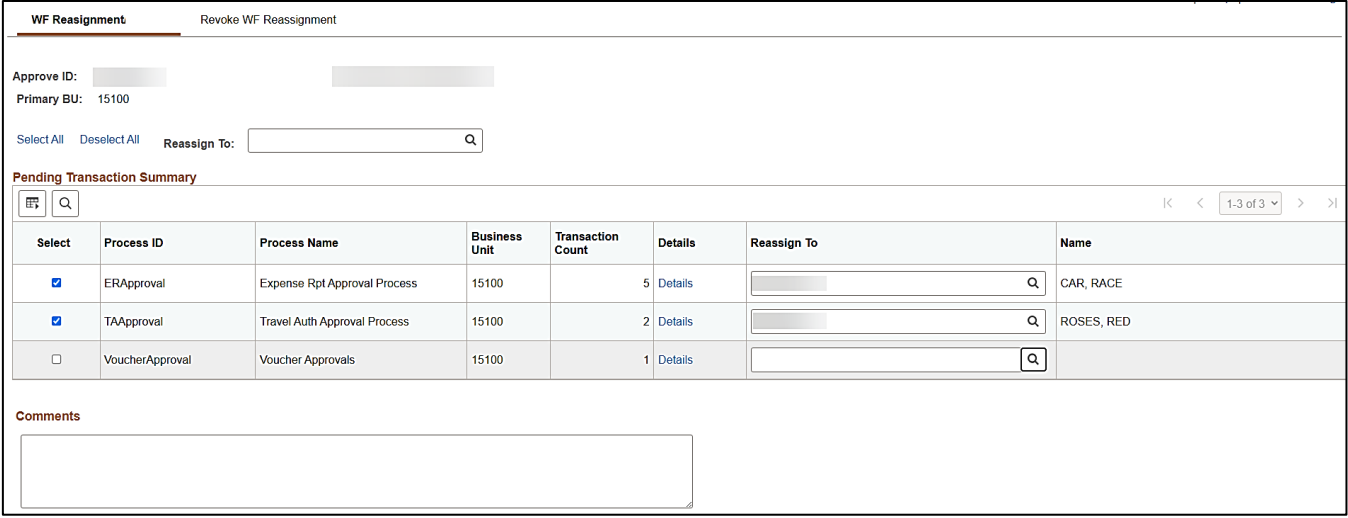
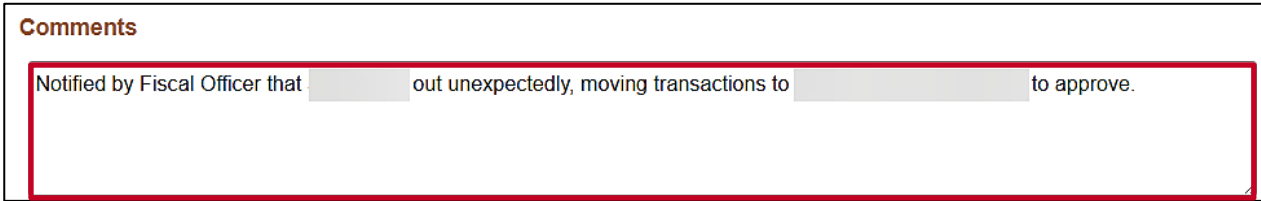
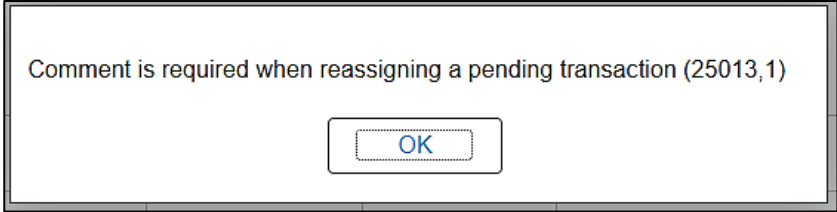
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Step	Action																																										
6.	Enter or select different names for each process in the Reassign To field next to that process. Pending Transaction Summary <table border="1"><thead><tr><th>Select</th><th>Process ID</th><th>Process 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>☐</td><td>ERApproval</td><td>Expense Rpt Approval Process</td><td>15100</td><td>5</td><td>Details</td><td> </td><td>CAR, RACE</td></tr><tr><td>☐</td><td>TAApapproval</td><td>Travel Auth Approval Process</td><td>15100</td><td>2</td><td>Details</td><td> </td><td>ROSES, RED</td></tr></tbody></table>	Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name	☐	ERApproval	Expense Rpt Approval Process	15100	5	Details		CAR, RACE	☐	TAApapproval	Travel Auth Approval Process	15100	2	Details		ROSES, RED																		
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☐	TAApapproval	Travel Auth Approval Process	15100	2	Details		ROSES, RED																																				
7.	Click the Select checkbox next to the Process to which changes need to be made. For this scenario the Expense Reports and Travel Authorizations are selected. <table border="1"><thead><tr><th>Select</th><th>Process ID</th></tr></thead><tbody><tr><td>☒</td><td>ERApproval</td></tr><tr><td>☒</td><td>TAApapproval</td></tr></tbody></table>	Select	Process ID	☒	ERApproval	☒	TAApapproval																																				
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☒	ERApproval																																										
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8.	Click the Details link for the selected process. <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>☒</td><td>ERApproval</td><td>Expense Rpt Approval Process</td><td>15100</td><td>5</td><td>Details</td></tr><tr><td>☒</td><td>TAApapproval</td><td>Travel Auth Approval Process</td><td>15100</td><td>2</td><td>Details</td></tr></tbody></table>	Select	Process ID	Process Name	Business Unit	Transaction Count	Details	☒	ERApproval	Expense Rpt Approval Process	15100	5	Details	☒	TAApapproval	Travel Auth Approval Process	15100	2	Details																								
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☒	TAApapproval	Travel Auth Approval Process	15100	2	Details																																						
The Transaction Detail page displays in a pop-up window for the selected process. Transaction Detail Approver's ID Process ID: ERApproval Business Unit: 15100 UnSelect All Transaction Details <table border="1"><thead><tr><th>Select</th><th>Business Unit</th><th>Document</th><th>Requester</th><th>Original Approver</th><th>Lact Action Oprid</th><th>Reassign To</th></tr></thead><tbody><tr><td>☒</td><td>15100</td><td>0000487835</td><td></td><td></td><td></td><td> </td></tr><tr><td>☒</td><td>15100</td><td>0000487837</td><td></td><td></td><td></td><td> </td></tr><tr><td>☒</td><td>15100</td><td>0000487839</td><td></td><td></td><td></td><td> </td></tr><tr><td>☒</td><td>15100</td><td>0000487852</td><td></td><td></td><td></td><td> </td></tr><tr><td>☒</td><td>15100</td><td>0000487862</td><td></td><td></td><td></td><td> </td></tr></tbody></table> OK Cancel		Select	Business Unit	Document	Requester	Original Approver	Lact Action Oprid	Reassign To	☒	15100	0000487835					☒	15100	0000487837					☒	15100	0000487839					☒	15100	0000487852					☒	15100	0000487862				
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☒	15100	0000487852																																									
☒	15100	0000487862																																									

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Step	Action																		
	All transactions have been automatically populated with the approver's name entered on the WF Reassignment tab.																		
9.	If all transactions will be reassigned, proceed to Step 11. If the user wants to select specific transactions to be moved, click the UnSelect All link to uncheck all transactions. UnSelect All																		
10.	Select the transactions that need to be reassigned by clicking the corresponding Select checkbox option(s). Transaction Details <table><tr><th></th><th>Select</th><th>Business Unit</th></tr><tr><td>1</td><td>☒</td><td>15100</td></tr><tr><td>2</td><td>☒</td><td>15100</td></tr><tr><td>3</td><td>☐</td><td>15100</td></tr><tr><td>4</td><td>☐</td><td>15100</td></tr><tr><td>5</td><td>☐</td><td>15100</td></tr></table>		Select	Business Unit	1	☒	15100	2	☒	15100	3	☐	15100	4	☐	15100	5	☐	15100
	Select	Business Unit																	
1	☒	15100																	
2	☒	15100																	
3	☐	15100																	
4	☐	15100																	
5	☐	15100																	
11.	Click the applicable button: - If all transactions remain selected, click the Cancel button. - If changes are made to which transactions will be routed, click the OK button to reassign the selected transaction. OK Cancel																		

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Step	Action
	The WF Reassignment tab redispays. 
12.	Enter any applicable notes in the Comments section of the page. Comments are required. Generally, this is copied from the email received requesting to move the transaction(s). 
13.	Click the Save button. 
	If a comment is not entered, an error message displays. - Click the OK button - Enter the applicable comments - Click the Save button. 

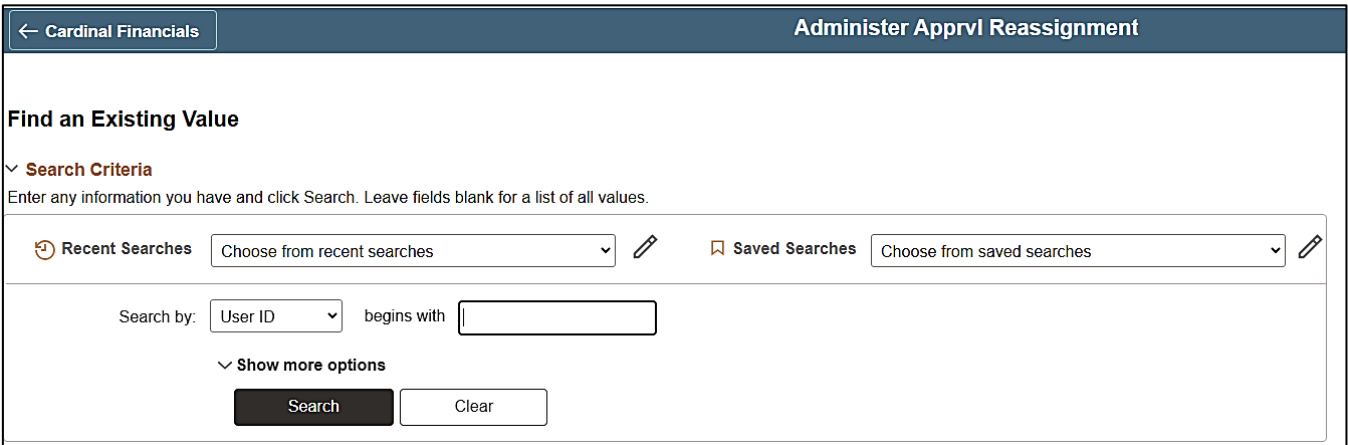
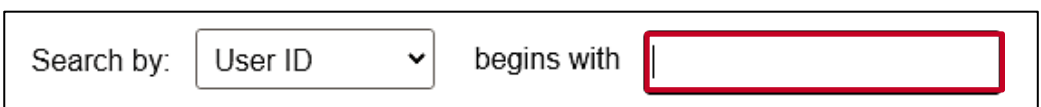


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Step	Action																
	The page refreshes and the reassigned transactions no longer display. WF Reassignment Revoke WF Reassignment Approve ID: Primary BU: 15100 Select All Deselect All Reassign To: Pending Transaction Summary <table><thead><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>☐</td><td>VoucherApproval</td><td>Voucher Approvals</td><td>15100</td><td>1</td><td>Details</td><td> </td><td></td></tr></tbody></table> Comments Save Return to Search Notify	Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name	☐	VoucherApproval	Voucher Approvals	15100	1	Details		
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name										
☐	VoucherApproval	Voucher Approvals	15100	1	Details												
	The transaction(s) has been successfully reassigned to the selected approver.																

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Revoking Assigned Transactions

Step	Action
1.	Navigate to the Administer Apprvl Reassignment page using the following path: NavBar > Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment The Administer Apprvl Reassignment Find an Existing Value Search page displays. 
	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 were moved and need to be revoked in the Search by field. 
3.	Click the Search button. 



Navigation Job Aid

NAV210 Workflow Reassignment – Workflow System Administrators

Step	Action
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The **WF Reassignment** page displays by default.

WF Reassignment

Revoke WF Reassignment

Approve ID:

Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary

1-1 of 1

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
☐	VoucherApproval	Voucher Approvals	15100	1	Details		

Comments

Save

Return to Search

Notify

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

WF Reassignment

Revoke WF Reassignment

The **Revoke WF Reassignment** page displays.

WF Reassignment

Revoke WF Reassignment

Approver's Oper ID:

Primary BU: 15100

Select All Deselect All

Pending Transaction Summary

1-2 of 2

View All

WL Summary

User Maint Info

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
☐							TAApapproval	15100	2
☐							ERApapproval	15100	5

Comments

Save

Return to Search

Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment



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Step	Action																				
	There are two tabs visible under the Pending Transaction Summary section: WL Summary and User Maint Info. WL Summary 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). <table border="1"><thead><tr><th>Select</th><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><th>Business Unit</th><th>WL Count</th></tr></thead><tbody><tr><td>☐</td><td></td><td></td><td></td><td></td><td></td><td></td><td>TAApapproval</td><td>15100</td><td>2</td></tr></tbody></table>	Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count	☐							TAApapproval	15100	2
Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count												
☐							TAApapproval	15100	2												
5.	Click the User Maint Info tab. WL Summary User Maint Info ▶▶																				

The **User Maint Info** page displays.

WF Reassignment

Revoke WF Reassignment

Approver's Oper ID:

Primary BU: 15100

Select All Deselect All

Pending Transaction Summary



<< < 1-2 of 2 > >> | View All

WL Summary

User Maint Info

▶▶

Entered By	Created Dttm
	08/23/2026 3:29:57.000000PM
	08/23/2026 3:29:55.000000PM

Comments

Save

Return to Search

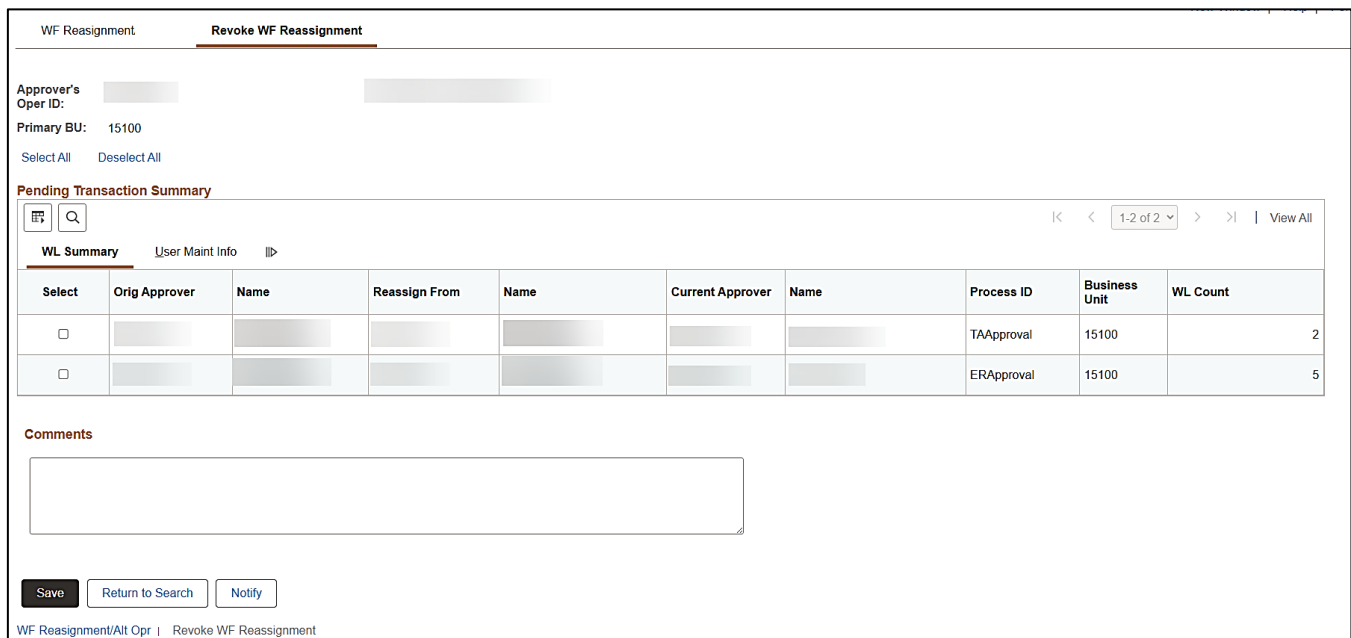
Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

NAV210 Workflow Reassignment – Workflow System Administrators

Step	Action
	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.
6.	Click the WL Summary tab. 

The **WL Summary** page redispays.



WF Reassignment **Revoke WF Reassignment**

Approver's Oper ID:

Primary BU: 15100

[Select All](#) [Deselect All](#)

Pending Transaction Summary

  1-2 of 2 [View All](#)

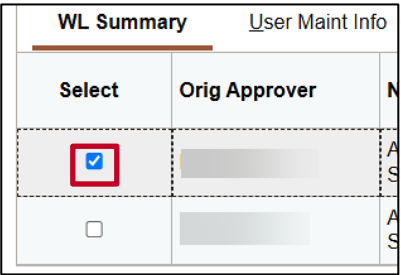
WL Summary [User Maint Info](#) [Filter](#)

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
☐							TAApproval	15100	2
☐							ERApproval	15100	5

Comments

[Save](#) [Return to Search](#) [Notify](#)

WF Reassignment/Alt Opr | [Revoke WF Reassignment](#)

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. 



NAV210 Workflow Reassignment – Workflow System Administrators

Step

Action

9.

Enter an appropriate comment in the **Comments** section.

Comments

Original approver returned and is able to approve transactions.

10.

Click the **Save** button.

Save

Return to Search

Notify

The page refreshes and the revoked transactions are removed.

Approver's
Oper ID:

Primary BU: 15100

Select All Deselect All

Pending Transaction Summary

1-1 of 1

View All

WL Summary

User Maint Info

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
☐									

11.

The selected process(es) are removed from the list. Click the **WF Reassignment** tab.

WF Reassignment

Revoke WF Reassignment



NAV210 Workflow Reassignment – Workflow System Administrators

Step

Action

The WF Reassignment page displays.

← Cardinal Financials

Admin Approval Reassignment

WF Reassignment

Revoke WF Reassignment

Approve ID:

Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary

Q

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>

1-3 of 3

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
☐	ERApproval	Expense Rpt Approval Process	15100	5	Details		
☐	TAApapproval	Travel Auth Approval Process	15100	2	Details		
☐	VoucherApproval	Voucher Approvals	15100	1	Details		

Comments

Save

Return to Search

Notify

i

The transactions that were revoked now display on this page.