

Workflow Reassignment - Workflow System Administrators

About Workflow Reassignment

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.

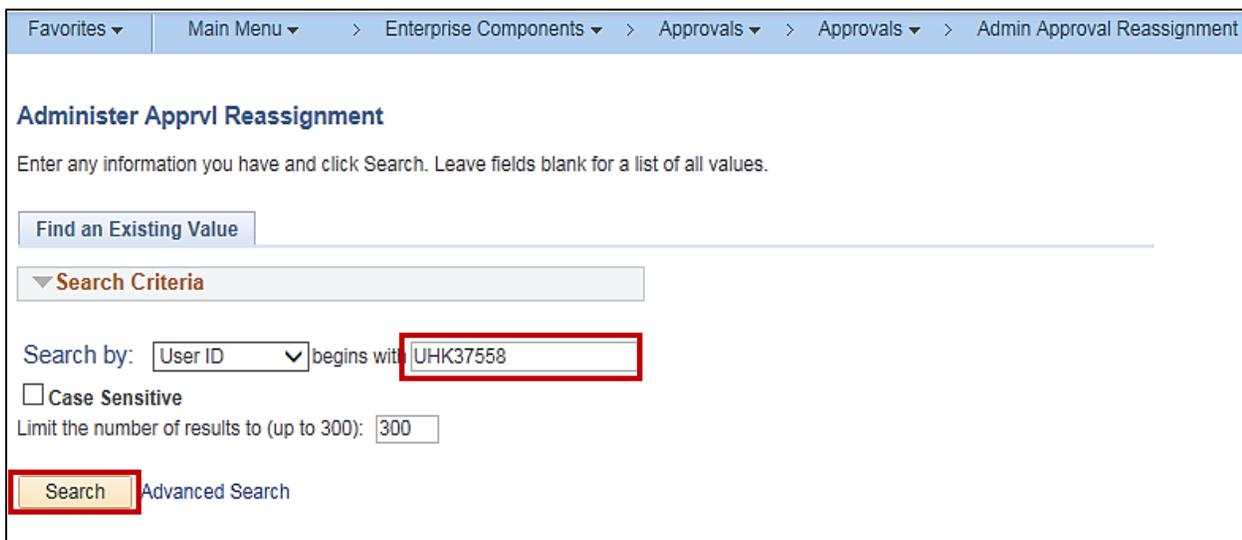
There are three scenarios when items need to be moved:

- 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 meet 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.

- 1 Navigate to **Admin Apprvl Reassignment** page using the following path:

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



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

Administer Apprvl Reassignment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: User ID ▾ begins with UHK37558

Case Sensitive

Limit the number of results to (up to 300): 300

Search Advanced Search

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



Workflow Reassignment - Workflow System Administrators

Approve ID: UHK37558 Jones, Tom (DOA)
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"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	<input type="text"/>	<input type="text"/>

Comments

Alternate User

Alternate User ID:

Business Unit

From Date: To Date:

Save Return to Search Notify

4 Two tabs display: WF Reassignment/Alt Opr and Revoke WF Reassignment.

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

This page also contains a section to enter an **Alternate User** for future dated items.

Approve ID: UHK37558 Jones, Tom
Primary BU: 15100

Select All Deselect All Reassign To: JOHN.SMITH SMITH,JOHN

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	JOHN.SMITH	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	JOHN.SMITH	SMITH,JOHN

Comments

Alternate User

Alternate User ID:

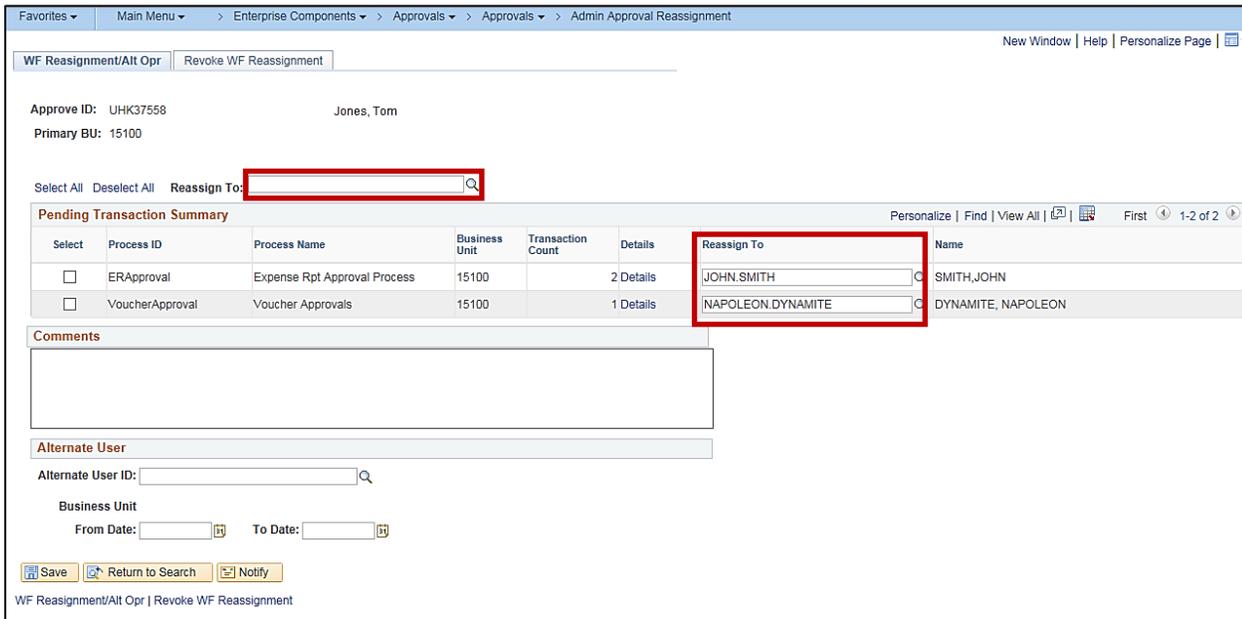
Business Unit

From Date: To Date:

Save Return to Search Notify

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

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Approve ID: UHK37558 Jones, Tom
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"/>	ERApproval	Expense Rpt Approval Process	15100		2 Details	<input type="text" value="JOHN.SMITH"/>	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	<input type="text" value="NAPOLEON.DYNAMITE"/>	DYNAMITE, NAPOLEON

Comments

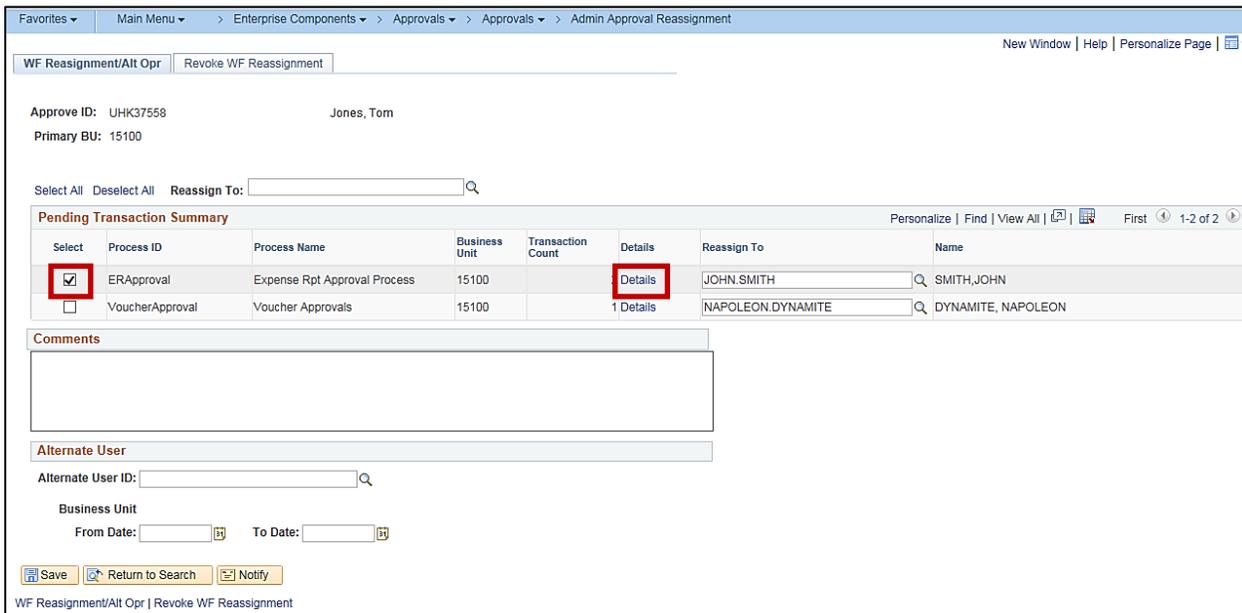
Alternate User

Alternate User ID:

Business Unit

From Date: To Date:

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



Approve ID: UHK37558 Jones, Tom
Primary BU: 15100

Select All Deselect All Reassign To:

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input checked="" type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100		Details	<input type="text" value="JOHN.SMITH"/>	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100		1 Details	<input type="text" value="NAPOLEON.DYNAMITE"/>	DYNAMITE, NAPOLEON

Comments

Alternate User

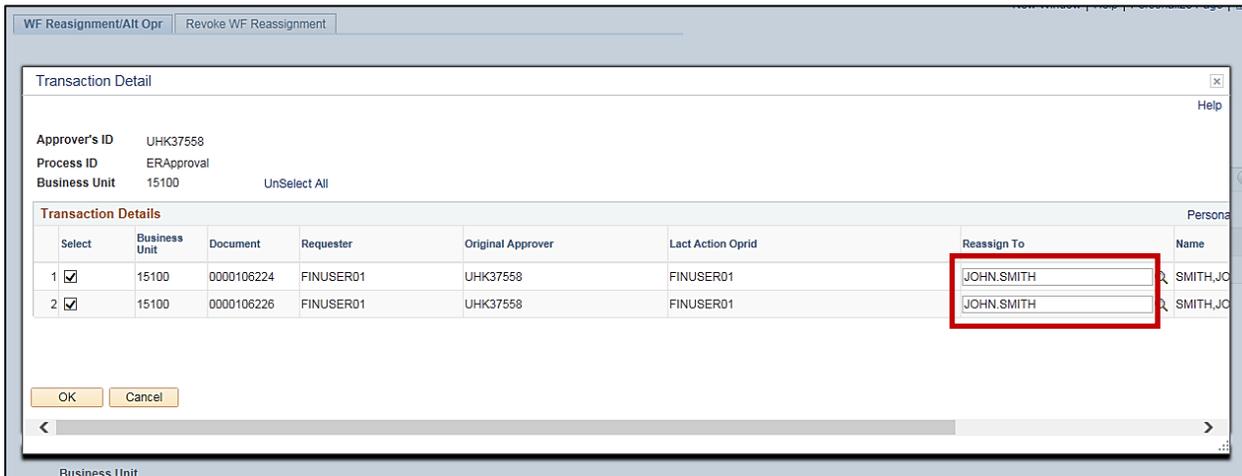
Alternate User ID:

Business Unit

From Date: To Date:

- Click the **Select** checkbox next to the **Process** you want to make changes to. For this example, Expense Reports is selected. There are two Expense Reports on this worklist.
- Click on the **Details** hyperlink for the selected process.

Workflow Reassignment - Workflow System Administrators



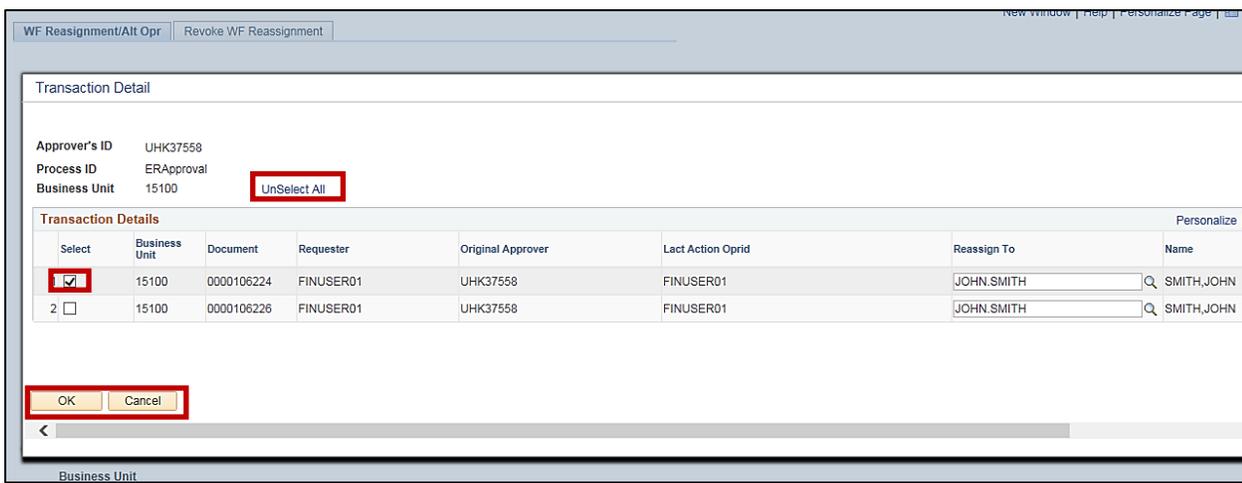
Transaction Detail

Approver's ID UHK37558
 Process ID ERApproval
 Business Unit 15100 UnSelect All

Select	Business Unit	Document	Requester	Original Approver	Lact Action Oprid	Reassign To	Name
<input checked="" type="checkbox"/>	15100	0000106224	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JOHN
<input checked="" type="checkbox"/>	15100	0000106226	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JOHN

OK Cancel

- 9 The **Transaction Detail** pop-up window displays for the selected process. All transactions have been autopopulated with the approver's name entered on the **WF Reassignment/Alt Opr** tab.



Transaction Detail

Approver's ID UHK37558
 Process ID ERApproval
 Business Unit 15100 **UnSelect All**

Select	Business Unit	Document	Requester	Original Approver	Lact Action Oprid	Reassign To	Name
<input checked="" type="checkbox"/>	15100	0000106224	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JOHN
<input type="checkbox"/>	15100	0000106226	FINUSER01	UHK37558	FINUSER01	JOHN.SMITH	SMITH,JOHN

OK Cancel

- 10 If you want all transactions to be moved, go to step 13.
- 11 If you want to select specific transactions to be moved, click on the **UnSelect All** hyperlink to uncheck all transactions.
- 12 Select the transactions that you want to include.
 For this scenario, one Expense Report is selected.
- 13 Click **OK** to reassign the selected transaction and return to the **WF Reassignment/Alt Opr** tab.

Workflow Reassignment - Workflow System Administrators

Favorites ▾ Main Menu ▾ Enterprise Components ▾ Approvals ▾ Approvals ▾ Admin Approval Reassignment New Window | Help | Personalize Page | 

WF Reassignment/Alt Opr Revoke WF Reassignment

Approve ID: UHK37558 Jones, Tom
 Primary BU: 15100

Select All Deselect All Reassign To: 

Pending Transaction Summary							Personalize Find View All  First 1-2 of 2 
Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input checked="" type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	2	Details	JOHN.SMITH	SMITH,JOHN
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100	1	Details	NAPOLEON.DYNAMITE	DYNAMITE, NAPOLEON

Comments

To: Jones, Sarah
Subject: Reassign Expense Report

Please reassign Expense Report #0000106224 from Tom Jones to John Smith.
Thanks,

Alternate User
 Alternate User ID: 

Business Unit
 From Date:  To Date: 

WF Reassignment/Alt Opr | Revoke WF Reassignment

14 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).

15 Click the **Save** button.

Process	15100	2 Details	JOHN.SMITH
	15100	1 Details	NAPOLEON.DYNAMITE

Message

Comment is required when reassigning a pending transaction (25013,1)

OK

16 If a comment is not entered, the above error displays.

17 Click the **OK** button.

18 Enter your comment.

19 Click the **Save** button again.



Workflow Reassignment - Workflow System Administrators

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment New Window | Help | Personalize Page |

WF Reassignment/Alt Opr Revoke WF Reassignment

Approve ID: UHK37558 Sprouse, Erin (DOA)
Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary Personalize | Find | View All | | | First 1-2 of 2

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	1	Details	<input type="text"/>	
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100	1	Details	<input type="text"/>	

Comments

To: Jones, Sarah
Subject: Reassign Expense Report
Please reassign Expense Report #0000106224 from Tom Jones to John Smith.
Thanks,

Alternate User

Alternate User ID:

Business Unit
From Date: To Date:

Save Return to Search Notify

WF Reassignment/Alt Opr | Revoke WF Reassignment

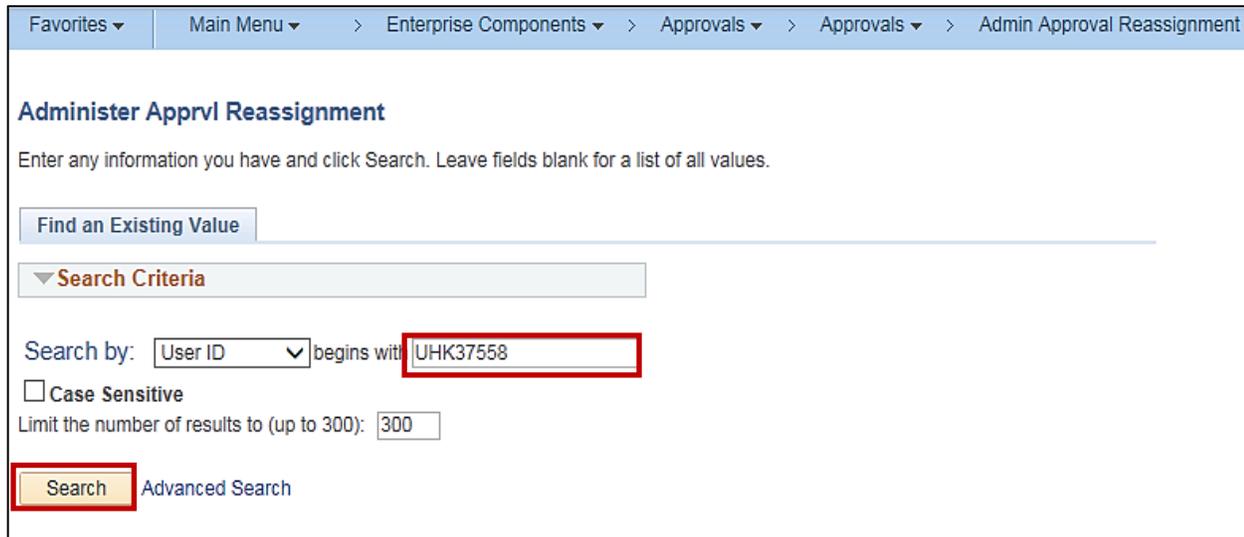
20 The transaction has been successfully reassigned to the selected name.

Note that the **Transaction Count** for Expense Reports has now been reduced from 2 to 1.

Workflow Reassignment - Workflow System Administrators

Revoke Assigned Transactions

- 1 To revoke a workflow reassignment, navigate to the **Admin Apprvl Reassignment** using the following path:
Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment



The screenshot shows the 'Admin Apprvl Reassignment' search interface. At the top, a breadcrumb trail reads: Favorites > Main Menu > Enterprise Components > Approvals > Approvals > Admin Approval Reassignment. Below this is the title 'Administer Apprvl Reassignment' and a prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a search bar with the placeholder 'Find an Existing Value'. Below the search bar is a 'Search Criteria' dropdown menu. The search criteria are set to 'Search by: User ID' (with a dropdown arrow) and 'begins with UHK37558'. There is a checkbox for 'Case Sensitive' which is unchecked. Below that is a text input for 'Limit the number of results to (up to 300):' with the value '300'. At the bottom left, there is a 'Search' button and a link for 'Advanced Search'.

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

Workflow Reassignment - Workflow System Administrators

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment
 New Window | Help | Personalize Page

WF Reassignment/Alt Opr **Revoke WF Reassignment**

Approver's: UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

Select All Deselect All

Pending Transaction Summary
Personalize | Find | View All | ⁽²⁾ First 1 of 1 Last

WL Summary **User Maint Info**

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
<input type="checkbox"/>	UHK37558	Jones, Tom	UHK37558	Jones, Tom	JOHN.SMITH	SMITH,JOHN	ERApproval	15100	1

Comments

WF Reassignment/Alt Opr | Revoke WF Reassignment

- 4 Click the **Revoke WF Reassignment** tab.
- 5 There are two tabs visible under the Pending Transaction Summary section i.e., **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 it was **Reassign From**, the **Current Approver** the transaction(s) who it was reassigned to, and the Process that was reassigned.
- 6 Click the **User Maint Info** tab.

Workflow Reassignment - Workflow System Administrators

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

WF Reassignment/Alt Opr | **Revoke WF Reassignment**

Approver's UHK37558 Jones, Tom
Oper ID:
Primary BU: 15100

Select All Deselect All

Pending Transaction Summary Personalize | Find | View All | [?] First 1 of 1 Last

WL Summary | **User Maint Info** [≡]

Entered By	Created Dttm
V_COVA_WF_WL_REASSIGN	02/21/2017 2:26:24.000000PM

Comments

[Save] [Return to Search] [Notify]

WF Reassignment/Alt Opr | Revoke WF Reassignment

- 7 This tab allows you to view previous transaction reassignment data. It includes who it was entered by and the date and time it was completed.
- 8 Click the **WL Summary** tab.

Workflow Reassignment - Workflow System Administrators

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment New Window | Help | Personalize Page |

WF Reassignment/Alt Opr **Revoke WF Reassignment**

Approver's UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

Select All Deselect All

Pending Transaction Summary Personalize | Find | View All | First 1 of 1 Last

WL Summary | User Maint Info

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
<input checked="" type="checkbox"/>	UHK37558	Jones, Tom	UHK37558	Jones, Tom	JOHN SMITH	SMITH,JOHN	ERApproval	15100	1

Comments

Revoked per email request from Tom Jones 2/21/2017

WF Reassignment/Alt Opr | Revoke WF Reassignment

- 9 Click the **Select** box next to the **Process** to be revoked.
 If you want to revoke all processes, click the **Select All** link.
- 10 Enter an appropriate **Comment**.
- 11 Click the **Save** button.

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > Admin Approval Reassignment New Window | Help | Personalize Page |

WF Reassignment/Alt Opr Revoke WF Reassignment

Approver's UHK37558 Jones, Tom
 Oper ID:
 Primary BU: 15100

Select All Deselect All

Pending Transaction Summary Personalize | Find | View All | First 1 of 1 Last

WL Summary | User Maint Info

Select	Orig Approver	Name	Reassign From	Name	Current Approver	Name	Process ID	Business Unit	WL Count
<input type="checkbox"/>									

Comments

Revoked per email request from Tom Jones 2/21/2017

WF Reassignment/Alt Opr | Revoke WF Reassignment

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



Workflow Reassignment - Workflow System Administrators

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

New Window | Help | Personalize Page |

WF Reassignment/Alt Opr | Revoke WF Reassignment

Approve ID: UHK37558 Jones, Tom
Primary BU: 15100

Select All Deselect All Reassign To:

Pending Transaction Summary Personalize | Find | View All | First 1-2 of 2

Select	Process ID	Process Name	Business Unit	Transaction Count	Details	Reassign To	Name
<input type="checkbox"/>	ERApproval	Expense Rpt Approval Process	15100	2	Details	<input type="text"/>	
<input type="checkbox"/>	VoucherApproval	Voucher Approvals	15100	1	Details	<input type="text"/>	

13 The Transaction is successfully revoked.

Note that the **Transaction Count** for Expense Reports has increased by 1, from 1 to 2.