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## EX.080.105 - Reassign Approval Work

#### Trigger:

#### Concept

This topic demonstrates how Expense Administrators can use the reassign approval work function in the Core Application to move transactions between Expense Approver's queues.

The Reassign Work feature allows administrators to move pending approval transactions from one approver’s queue to another. This can be necessary if an approver is on leave, but has not defined an alternate approver in their absence. This feature can also be used to reroute a transaction that was sent to the wrong approver.

Approvers can use the Self-Service Portal to reassign their own Worklist transactions (see Business Process document EX.080.106.) Administrators, however, can reassign transactions from any approver's queue (which will be covered in this topic).

**Topic Objectives:**

Upon completion of this topic, you will be able to:

- Identify why it may be necessary to reassign approval work.

- Identify what transactions may be reassigned .

- Identify how the system prevents routing a transaction for approval to the originator of the transaction.

- Reassign approval work.

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

For this topic, you need to reassign the pending Expenses Transactions in Terence Howard’s queue to Abi Okunsanya. Let’s see how this is done.

| Step | Action |
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|  | The **Reassign Approval Work** feature only transfers existing transactions that are already in an employee's Worklist.  If you wish to route future transactions to a different user (such as when an employee is on vacation) this is performed by designating an Alternate User (see EX.020.400). |
|  | Click the**Travel and Expenses** link. |
|  | Click the **Manage Expenses Security**link. |
|  | Click the **Reassign Approval Work** link. |
|  | Click the **Search** button to return a list of applicable User IDs. |
|  | Employees who have access to the **Reassign Approval Work** in the Core Application can review anyone's worklist at the institution and can reassign any or all transactions within those worklists. |
|  | Click an entry in the**User ID** column. |
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|  | Click the **Collapse Menu** button to view a larger section of the screen. |
|  | The Expenses Workflow process is fairly straightforward when the appropriate approvers perform their assigned duties in a timely manner.  However, complex situations may occur when there are alternate users, or when a transaction is reassigned to an inappropriate party. The next few pages discuss some of the additional re-routing rules and tips which can be used to help identify the correct routing for a transaction. |
|  | When you use the **Define Security - Reassign Work** page to reassign work from one approver to another, Expenses validates user IDs and transactions:  - Expenses generates an error and terminates the reassign operation if you enter the same approver in the **Reassign Work To** field on the Define Security - Reassign Work page. For example, MGR1 cannot reassign work to MGR1.  - If the originator of an expense transaction is the same as the reassigned approver, Expenses performs the reassignment but when the new approver attempts to perform an approval action, they receive a message indicating that they are not authorized to approve a transaction that they submitted. For example, MGR1 reassigns the work to MGR2. Expenses encounters an expense transaction that MGR2 created and submitted to MGR1 for approval. |
|  | - If the escalation process picks up a transaction for rerouting (it was not worked within 5 days), and the approver who is designated as the target for rerouting is the same person as the employee or submitter, the system routes the transaction to the approver's supervisor (if one is listed on the User Profile page).  - If the rerouting process picks up a transaction for rerouting, and the approver who is designated as the target for rerouting is the same person as the employee or submitter, the system routes the transaction to them but does not enable them to take any transaction approval action on the approval pages.  - If you reassign a transaction to an approver who has already approved the transaction, the system will not route the transaction to that approver again. |
|  | **Rules for Alternate Approvers:** (remember an alternate approver is a temporary assignment of Workflow transactions to another user (see ***EX.020.400***).  If the alternate approver is the same person as the approver whose work is being reassigned, the system reassigns the work as follows:  MGR1 assigns the work to MGR2. MGR1 is also the alternate approver for MGR2. The system ignores the delegation and reassigns the work to MGR2. |
|  | Click the **Select**checkbox next to the transaction you wish to reassign. |
|  | Click the **Look up** button next to the **Reassign Work To** field to select who you want to route the transaction to. |
|  | Click an entry in the **User ID** column.  The user must be setup as an approver for it to be properly routed. |
|  | Click the **Reassign** button. |
|  | The transaction has now been reassigned. Notice that the transaction no longer appears on the page. |
|  | T  The approver who just received the reassigned transaction can now perform an appropriate approval action on this item. |
|  | Congratulations. You have just completed the **Reassigning Approval Work** topic. Below is a summary of the key concepts of this topic:  - Reassigning approval work may be necessary if an approver is on leave, but did not define an alternate approver in their absence. Approval work may also be reassigned to reroute a transaction that was sent to the wrong approver.  - Transactions that are pending approval or are held in an approver’s queue can be reassigned.  - The system validates User IDs and transactions to prevent routing a transaction for approval back to the originator of that transaction for approval, which would be considered a circular reference.  **End of Procedure.** |