

EX.080.106 – REASSIGNING APPROVAL WORK IN SELF-SERVICE

Purpose	<ul style="list-style-type: none"> • 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.
Description	<p>The Reassign Work feature allows an approver to move Expense transactions from his/her queue to another approver's queue. 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.</p> <p>Reassignment can only be done for a transaction that is pending approval or held in an approver's queue. Approval items can be reassigned manually to another approver, other than yourself as long as the reassignment does not create a circular reference. PeopleSoft will reroute to the Workflow Administrator any approval items that have not been approved after five days "escalation."</p> <p>In the Self-Service Portal, an approver can only reassign items from his/her own worklist. Due care should be exercised to ensure that the User who receives your Worklist transactions can make informed and impartial decisions on the transactions. Additionally, the User must have the appropriate security access to act on the Expense transactions (approve, deny, send back, etc).</p> <ul style="list-style-type: none"> • Reassigning approval work may be necessary if you receive a transaction that you do not wish to perform an approval action for. • 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.
Security Role	BOR_EX_REASSIGN

Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to reassign approval work in self-service.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu link.
3.	Click the Manager Self-Service link.
4.	Click the Manage Expenses Security link.
5.	Click the Reassign Approval Work link.
6.	In the Self-Service portal, an approver can only reassign items that are in his/her own Worklist queue.
7.	<p>As an Approver, the first task users should perform when they review an item in their Worklist is to determine whether or not they should act on that transaction.</p> <p>If a user wishes to act on the transaction, they can deny it, send it back to the traveler, place it on hold, or approve it.</p> <p>If, however, a user does not wish to perform one of these tasks for the transaction, or perhaps they are not the appropriate approver for the transaction, the user should reassign it to the correct approver.</p>
8.	<p>Here are some tips on using the Reassign function:</p> <ul style="list-style-type: none"> - The system will generate an error and terminate the reassign operation if you attempt to reassign a transaction to yourself. - If a user reassigns a transaction to an approver who happens to be the originator of the expense transaction (traveler) the system will perform the reassignment, however this individual will receive an error message indicating that they are not authorized to approve a transaction that they submitted.

Step	Action
9.	<p>A user can reassign one transaction at a time or they can reassign all items in their queue at the same time by using the Select All feature.</p> <p>For this exercise, we want two expense reports to be reassigned to Annette Mitchell.</p>
10.	Click the Select checkbox next to an entry you wish to reassign.
11.	Click the Select checkbox next to another entry you wish to reassign.
12.	Click the Look up button next to the Reassign Work To field to select who you want to route the transactions to.
13.	<p>For this exercise, we know that Annette Mitchell's User ID starts with AM.</p> <p>Enter "AM" in the begins with field.</p>
14.	Click the Look Up button.
15.	Select the correct entry in the User ID column.
16.	When the user is ready to reassign the transactions, click the Reassign button.
17.	<p>Notice that the transactions no longer appear in the user's Worklist.</p> <p>The approver who just received the reassigned transactions can now perform the appropriate approval action on these items.</p>