

EX_080_105 – REASSIGNING EXPENSE TRANSACTIONS

Purpose	To reassign Expense transaction(s) from one Approver’s Worklist to another Approver
Description	<p>Expense Administrators can use the Reassign Approval Work page in the Core Portal to move transactions between any Expense Approvers’ Worklists. Reassigning a transaction to another Approver is necessary if:</p> <ul style="list-style-type: none"> • A transaction routes to the incorrect Approver • An Approver is out of the office, but has not defined an Alternate Approver in their absence • Transactions were unapproved for a designated number of days (default is 8 days) and escalated to the Expense Workflow Administrator. This escalation is in place to prevent transactions from being unapproved for extended periods of time. <p>If the Expense Workflow Administrator is the traveler, the system routes the transaction to the Approver's Designated Approver if one is listed on the Organizational Data tab of the Expense profile.</p> <p>For more information on how Approvers can reassign their own Worklist transactions, see EX.080.106 – Reassigning Approval Work in Self-Service.</p>
Security Role	BOR_EX_REASSIGN, BOR_EX_ADMINXX, and BOR_EX_APPROVAL
Assumptions	None

Dependencies/ Constraints	<p>For a transaction to be eligible for reassignment, it must have been submitted for approval and have a status of Submitted or Approvals in Process.</p> <p>The additional Approver who receives the reassigned transaction must have the BOR_EX_APPROVAL role to take approval action.</p>
Additional Information	<p>To see all transactions currently in the approval workflow process and the User Worklist they reside in, run the BOR_EX_WF_BLACK_HOLE query.</p>

Procedure

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the Travel and Expenses link.
4.	Click the Manage Expenses Security link.
5.	Click the Reassign Approval Work link.
6.	<p>Enter the User ID or click the Search button to return a list of applicable User IDs.</p> <p><i>Note: Expense Administrators with access to Reassign Approval Work in the Core Portal can access anyone's worklist at the institution and reassign any or all transactions within those worklists.</i></p>
7.	Click the Select checkbox next to the transaction(s) to reassign it.
8.	Click the magnifying glass icon next to the Reassign Work To field to display a list of Approvers or enter the User ID of the additional Approver in this field.
9.	<p>Click an entry in the User ID column.</p> <p><i>Note: If a user reassigns a transaction to an approver who already approved the transaction, the system does not route the transaction to that Approver again.</i></p>
10.	Click the Reassign button.
11.	The transaction is reassigned. Verify the transaction no longer appears on the Reassign Approval Work page.
12.	The new Approver can now approve the transaction.