

How to Reassign Workflow in the Expense Module

Approvers/Auditors may need to reassign transactions from one approval queue to another in cases when the standard workflow path is not sufficient. Approvers/Auditors have the ability to either reassign a transaction in their approval queue to another Approver/Auditor or to pull a transaction from someone else's queue into their own. The instructions below describe each process.

Reassign Transaction(s) to Another Approver/Auditor

- 1) Sign into the Expense Module and select **Expense WorkCenter**. Click on **Reassign My Workflow** in the Expense *WorkCenter*. On the following screen, click the **Search** button.

Reassign My Workflow

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

Find an Existing Value

▼ **Search Criteria**

User ID begins with ▼ 00798767

Description begins with ▼

Definition ID begins with ▼ UWSYS 🔍

Case Sensitive

Search **Clear** Basic Search 🔍 Save Search Criteria

- 2) Enter the Employee ID of the individual you would like to reassign the transaction to in the *Reassign Workflow To* field. Hit the *Enter* key or click the **Reassign** button. Your approval queue will appear.

Tip: If you do not know the individual's Employee ID, change the **Search By** drop-down menu to **Description** and enter the individual's last name in the **begins with** field. Click the Search button and select the individual from the list.

UW Travel and Expenses
 Reassign My Workflow to Another

Approver: EXMRG3 Approver, EXMRG 3
 Reassign Work To: EXMRG1 x Q Approver, EXMRG 1

Select All Deselect All

| Select | Business Unit | Transaction Type | Total Amount | Name | Empl ID | Report ID | Submission Date | Role |
|--------------------------|---------------|----------------------|--------------|------------------------------|----------|------------|-----------------|----------|
| <input type="checkbox"/> | UWPLT | Cash Advance | \$4,440.000 | Employee,EXUSER02 A | EXUSER02 | 0000005003 | 06/06/2018 | Approver |
| <input type="checkbox"/> | UWMSN | Expense Report | \$96.000 | WALDOCH,GREGORY D | 00183187 | 0000537383 | 04/25/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$38.250 | Employee,EXUSER01-Stefanie A | EXUSER01 | 0000537555 | 05/21/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$15.000 | SCHWARTZ,SHARON A | 00798767 | 0000537576 | 05/24/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$15.000 | SCHWARTZ,SHARON A | 00798767 | 0000537577 | 05/24/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$101.020 | Employee,EXUSER03 A | EXUSER03 | 0000537606 | 06/04/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$678.770 | Employee,EXUSER01-Stefanie A | EXUSER01 | 0000537613 | 06/04/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$777.770 | Employee,EXUSER01-Stefanie A | EXUSER01 | 0000537614 | 06/05/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$38.250 | Employee,EXUSER01-Stefanie A | EXUSER01 | 0000537619 | 06/05/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$766.900 | Employee,EXUSER01-Stefanie A | EXUSER01 | 0000537620 | 06/05/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$15.000 | Employee,EXUSER02 A | EXUSER02 | 0000537640 | 06/06/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Expense Report | \$15.000 | Employee,EXUSER02 A | EXUSER02 | 0000537641 | 06/06/2018 | Approver |
| <input type="checkbox"/> | UWMSN | Expense Report | \$6,214.320 | SIMS,COLLEEN | 00125989 | 0000537665 | 06/11/2018 | Approver |
| <input type="checkbox"/> | UWMSN | Travel Authorization | \$610.000 | LINTON,RICHARD T | 00185532 | 0000037942 | 05/11/2018 | Approver |
| <input type="checkbox"/> | UWPLT | Travel Authorization | \$122.000 | SCHWARTZ,SHARON A | 00798767 | 0000038003 | 04/20/2018 | Approver |

Select All Deselect All

3) Click the box in the *Select* column next to the transaction you wish to reassign. Click the **Reassign** button. The selected transaction will disappear from your Approval queue.

Note: If you are unable to select a transaction in your queue, the desired recipient is not an assigned Approver/Auditor or has already approved that specific report.

Reassign Transaction(s) from Another Approver/Auditor

1. Sign into Expense Module. Click on **Reassign Workflow to Me** link in the *Expense WorkCenter*.
2. Enter the Employee ID of the individual who holds the transaction you wish to receive.
3. Click the **Search** button. The selected individual's approval queue will appear. Note that your Employee ID has automatically populated the *Reassign Work To* field.
4. Click the box in the *Select* column next to the transaction you wish to reassign. Click the
5. **Reassign** button. The selected transaction will disappear from the approval queue and can now be accessed by clicking the **Approve Transactions** link in the *Expense WorkCenter*.