State of Wisconsin

Department of Administration

Reassign Expenses Worklist Items Job Aid

Version 1.0

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PURPOSE AND DESCRIPTION

Purpose

This document explains the key topics involved in Reassign Expenses Worklist Items. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activities.

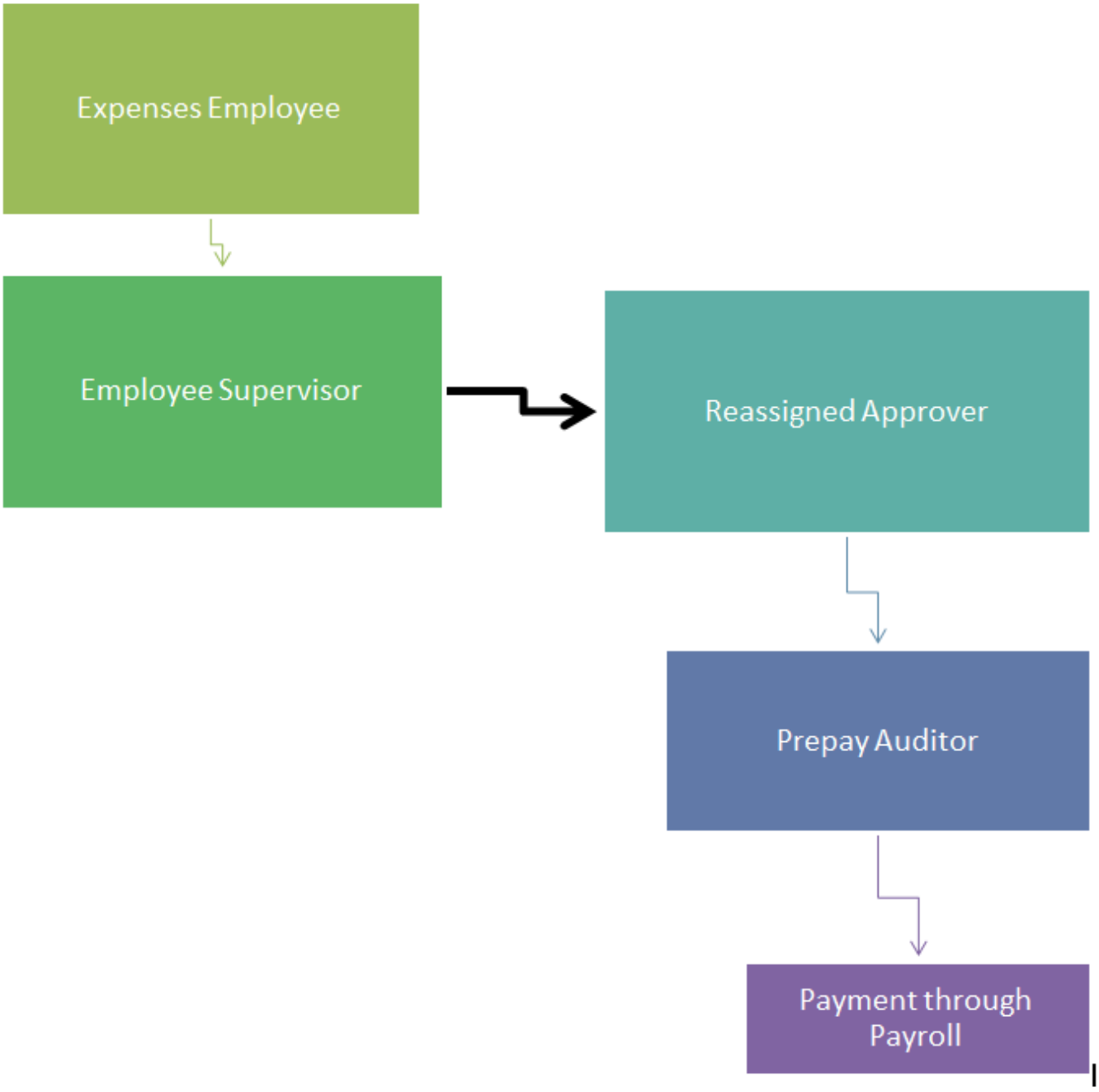
Description

The key topic involved in the Reassgn Expenses Worklist Items process is how an Expenses Approver can Reassign Expense Worklist Items to themselves or to others.

TOPIC 1: REASSIGN EXPENSES WORKLIST ITEMS

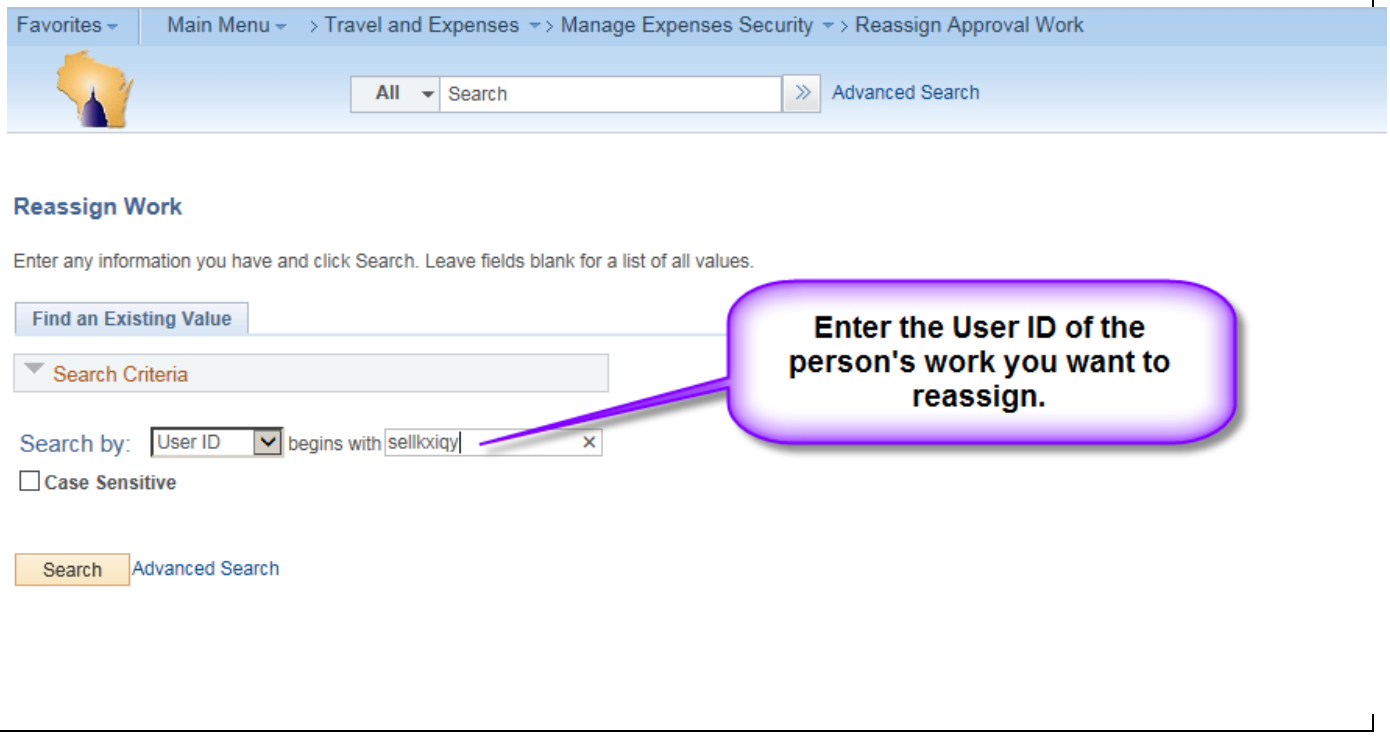
Process Flow

Given below is the Reassign Expenses Worklist Items business process flow. This process flow will help you understand the system-generated actions as well as the tasks that are performed manually. An Expenses Approver has the ability to reassign their own worklist items to another Expenses Approver . An Expenses Approver is also able to reassign worklist items from one Expenses Approver to another Expenses Approver.



Reassign Expenses Worklist Items Procedure Steps

Scenario: We want to reassign tems from Kim Sell's worklist to Stacey Beattie's worklist. Follow the steps explained below.

Step	Action
1.	Sign into STAR PeopleSoft
2.	Navigate to: Travel and Expneses > Manage Expenses Security > Reassign Approval Work
3.	

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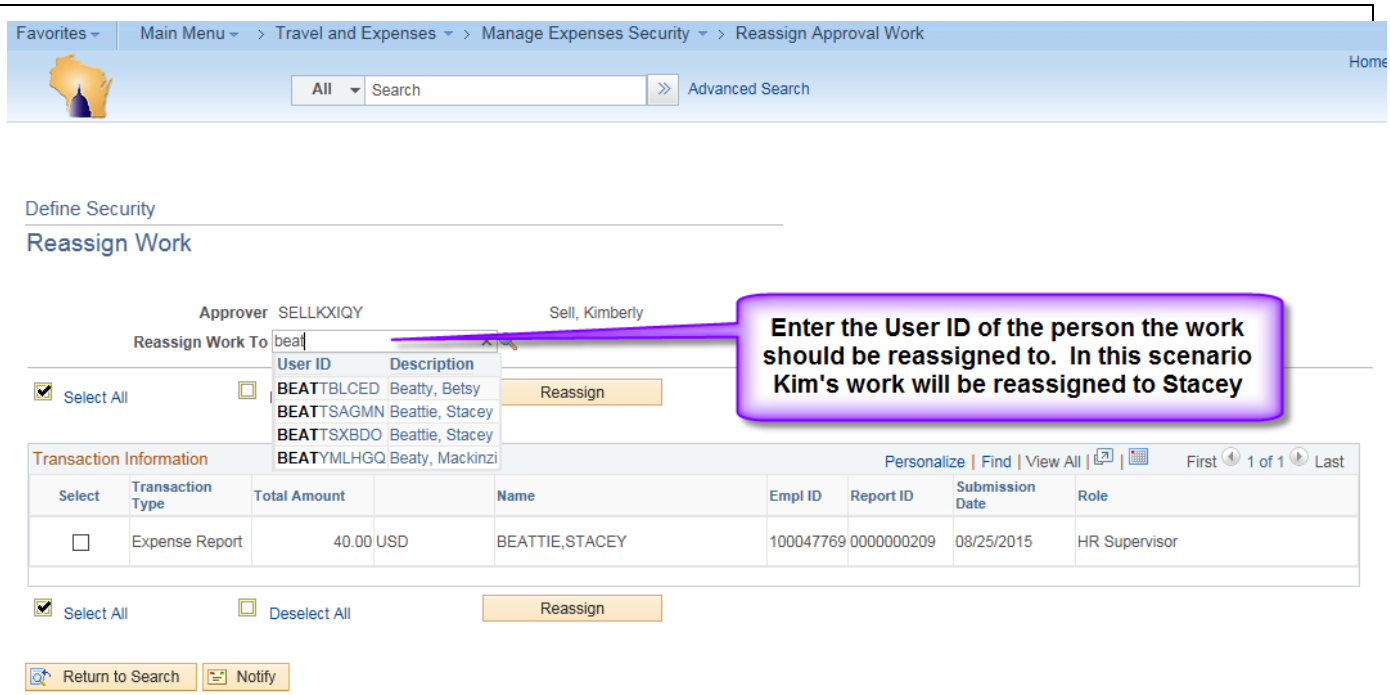

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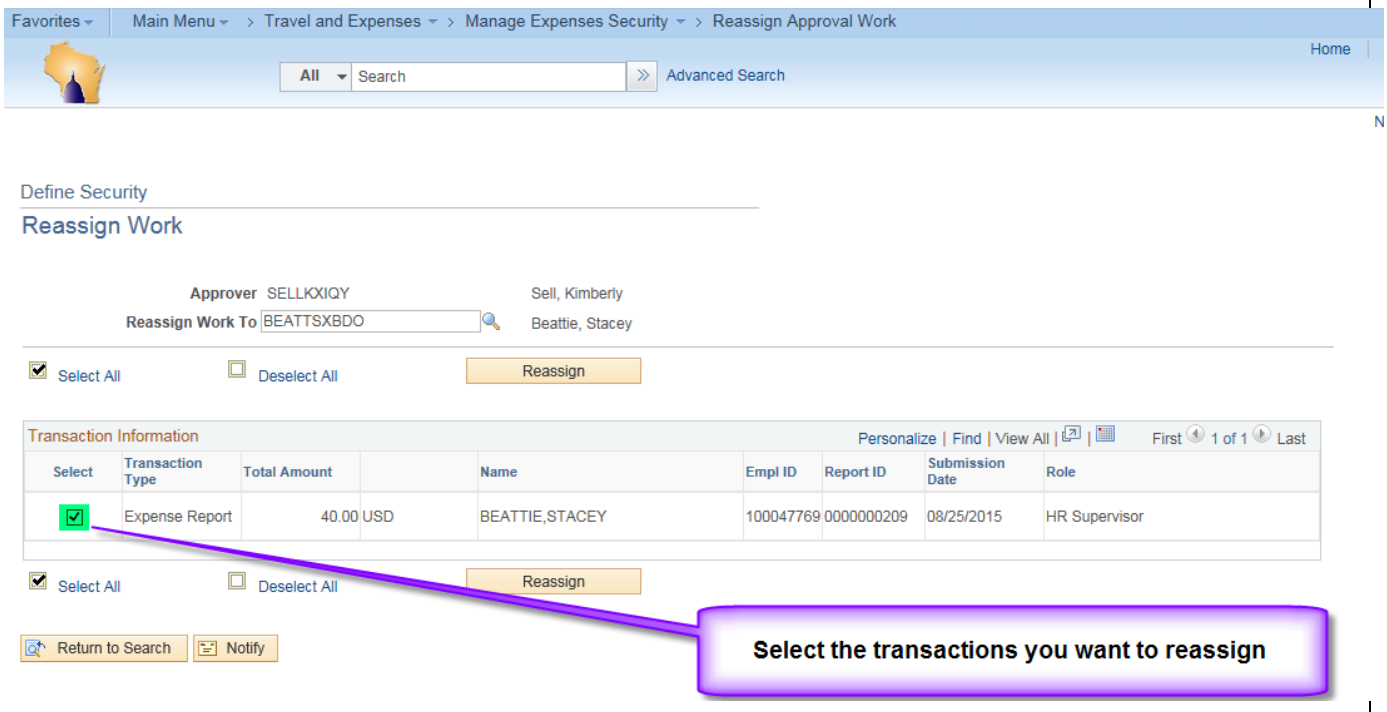
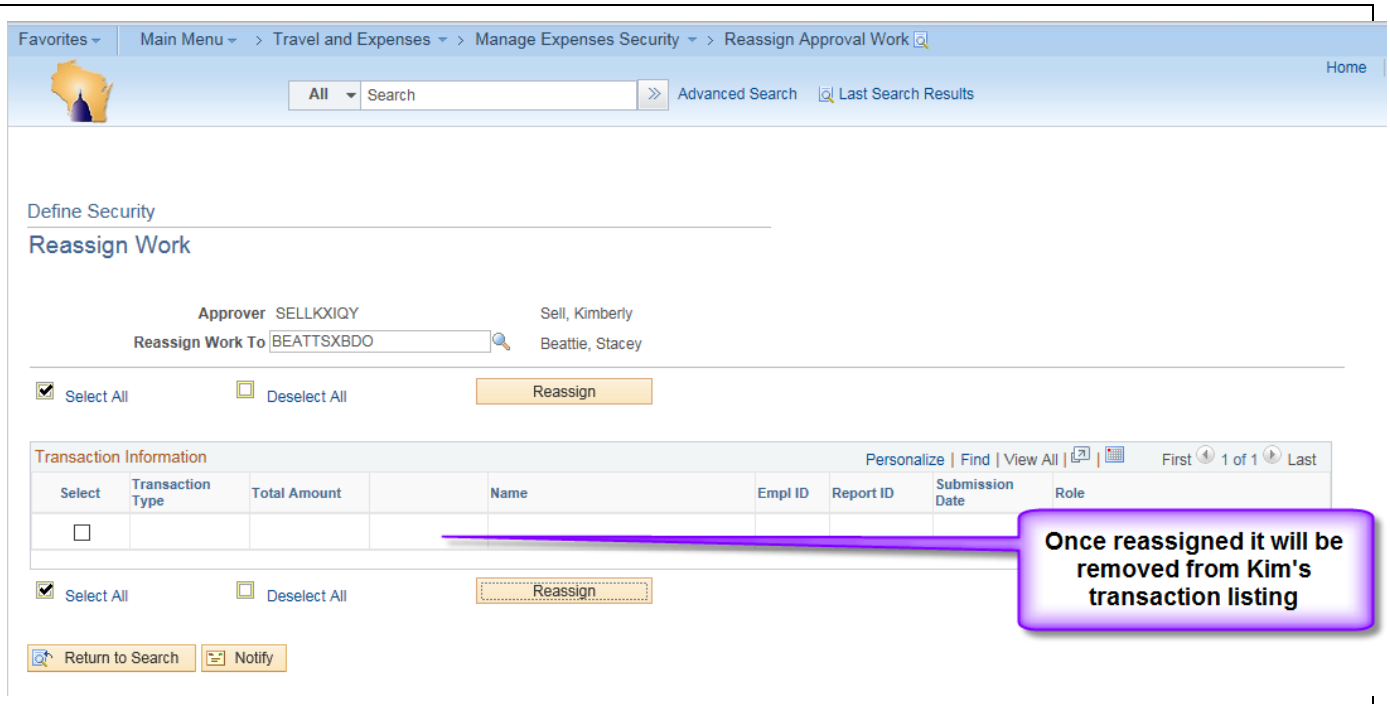


6. Click on the Reassign button

7.	
8.	The items will now be in Stacey Beattie's worklist. She is now able to follow the normal EX Approval Process.