



# NAV210: Introduction to Approvals

*Web Based Training*



# Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course, we will provide an overview of the approvals process. Additional web based classes provide additional training, which is specific to the functional area and its transactions.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your Agency Security Handbook for a list of available roles and descriptions.



# Course Navigation

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**INTRO101: Cardinal Overview**

**CARDINAL™**

*Web Based Training*

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Rev 3/1/2012



# Course Objectives

This course will provide you with an introduction to:

- Using the different methods of approval in Cardinal
- Using your worklist(s) to approve items in Cardinal
- Delegating Human Capital Management (HCM) application worklist items to a proxy
- Assigning Financials (FIN) application worklist items to an alternate approver
- Approving and denying items
- Pushing back and sending back items
- Adding an additional approver or reviewer



# Lesson 1: Approvals Overview

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In this lesson, you will learn about the following topics:

- Overview of Approval Processing
- Methods of Approval



# Approvals in Cardinal

Cardinal contains two applications: a Financial Application and a Human Capital Management Application. The diagram shows the functional areas of both Cardinal applications

## Cardinal Financial Application (FIN)

**Accounts Payable** – Vouchers, Travel authorizations, Expense Reports, Cash Advances

**Accounts Receivable** – Funds Receipt Deposits, Billing Adjustments, and Item Adjustments

**General Ledger** – Journals

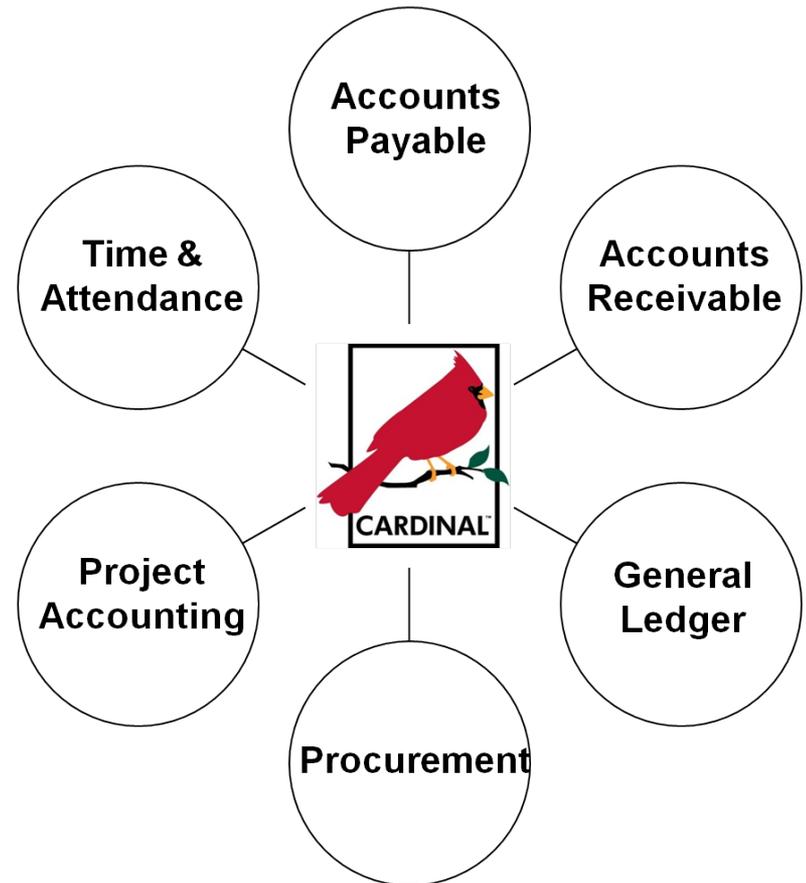
**Procurement** – Requisitions (including Web IMS restock), Purchase Orders, Change Orders (including Close Short Change Orders), Procurement Card (PCard), Integrated Supply Services Program (ISSP), Procurement Contracts, and Strategic Sourcing Events

**Project Accounting** – Projects, Project Distributions, and Billing Worksheets

## Cardinal Human Capital Management (HCM) Application

**Time & Attendance** – Reported Time (including Absences), Payable Time, and Extended Leave Requests

## Cardinal Functional Areas



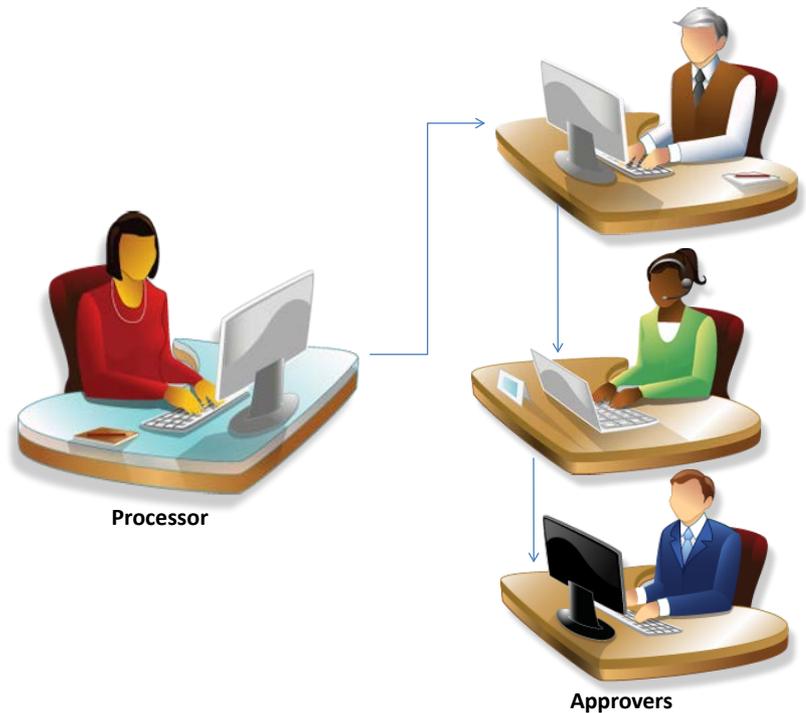


# Overview of Approval Processing

Approving an item in Cardinal allows it to be processed further.

Cardinal uses Workflow to route some items through the approval process. Workflow describes the path of approval(s) required for an item to continue being processed.

Some items require just one approval; others require multiple approvals by different individuals. In Cardinal, the user who enters or processes the item is usually different from the user or users who approve it. In most cases, Cardinal Security prevents the same user from both entering and approving a transaction.





# Approval Actions

You can take various actions, depending on the type of item you are reviewing. Options include:

- **Approve** - Approve the item for further processing.
- **Push Back** - Send the item back to the prior level of approval for further review and a redetermination of approval.
- **Send Back** – Send the transaction to the creator for updates or deletion.
- **Deny** - Deny the item.
- **Hold** - Place a transaction on hold and reserve it for later action related to approval. The hold feature also allows you to prevent other approvers from taking action on the item.



# Notifications in Cardinal

There are two separate worklists in Cardinal: one for Financials (FIN) and one for Human Capital Management (HCM). You access FIN items needing your approval in the Financials application and HCM items needing your approval in the Human Capital Management application.

Cardinal uses various methods to notify you that an item needs approval. Some notifications also occur outside of Cardinal (e.g., a user sends you an email). The type of item determines which specific notification methods are available.

Cardinal may notify you (e.g., via worklist, etc.) when an item has been denied or pushed back.

In some cases, reports or queries also identify items that are ready for approval.



# Methods of Approval - Accessing Approval Items

You can use various methods to access items needing approval. The type of item determines which specific access methods are available. Examples include:

- **Page:** Navigate directly to the related page in the Cardinal module to approve an item.
- **Worklist:** Navigate to your worklist and click on the link to an item.
- **Pagelet:** Access the item from an added menu item. Pagelet examples include PCard and ISSP approval items and are described in the PROC343: Procurement Approvals course in more detail.
- **Email notification:** Access the item from a link in an email notification. Email notification examples include Requisitions and are described in the PROC343: Procurement Approvals course in more detail.



# Methods of Approval - Worklist

A worklist is an organized list of items in Cardinal that need your review and/or approval. A worklist allows you to:

- View additional details about each worklist item
- Navigate to pages where you can work (i.e. approve, deny, etc.) the item

Items remain on your worklist(s) until they are worked (i.e., approval or other action is entered), or marked as worked.

Worklist for DNE61689: DOE, JOHN P.

Work List Filters:

From	Date From	Work Item	Worked By Activity	Priority	Link	
SMITH, SUSAN	11/08/2012	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval_175883_50100_1901-01-02.N.0</a> <a href="#">BUSINESS_UNIT:15100</a> <a href="#">VOUCHER_ID:00000008</a> <a href="#">RDC:RA.0.A</a>	<input type="button" value="Mark Worked"/> <input type="button" value="Reassign"/>



# Lesson Summary

In this lesson, you learned:

- Cardinal has two applications, FIN and HCM. To approve FIN items, you go to the Financial application. To approve HCM items, you go to the Human Capital Management application.
- Cardinal uses various methods to notify you of an item that needs your approval.
- Some notifications occur outside Cardinal (e.g., via email from the person who entered the transaction).
- You can access an item using various paths. Examples include:
  - Accessing your Cardinal worklist and clicking on the link to the item
  - Navigating directly to the related page to approve the item
- Cardinal security generally does not allow users to approve a transaction that they entered.



# Lesson 2: Managing Your Worklist

In this lesson, you will learn about the following topics:

- Approving Items from a Worklist
- Assigning Your Cardinal Financials (FIN) Application Worklist to an Alternate Approver
- Delegating Your Cardinal Human Capital Management (HCM) Application Worklist to a Proxy
- Error Worklist Items
- Reassigning Specific Worklist Items
- Adding Approvers and Reviewers to Workflow
- Pooled Worklists



# Cardinal Worklists

To access your Financials application worklist items on the Cardinal Financials (FIN) **Home** page you can:

- Navigate to **Main Menu > Worklist**, or
- Click on **Worklist** on the Header of the Financials application page.

To access your **Cardinal Human Capital Management (HCM)** worklist items, click the **Cardinal HCM** Link in the portlet. Then use either of the options above to access your HCM worklist.

The screenshot shows the Cardinal Financials application interface. At the top, there is a navigation bar with links for Home, Worklist, Add to Favorites, and Sign out. Below this is a 'myCardinal Messages' section. The main content area features a 'myCardinal Financials' portlet with three sub-sections: 'Financials Report Execution', 'Financials Report Retrieval', and 'Financials Links'. The 'Financials Links' section contains a link for 'Cardinal HCM'. On the left side, there is a 'Menu - Classic' sidebar with a search field and a list of application areas. The 'Worklist' option is highlighted in red in this menu. A separate box at the bottom left shows a detailed view of the 'Worklist' option, listing sub-items like 'Set Up Financials/Supply Chain', 'Enterprise Components', 'Tree Manager', 'Reporting Tools', 'PeopleTools', 'My Personalizations', and 'My System Profile'.



# Cardinal Worklists (continued)

Both the **FIN** and **HCM Worklist** pages provide summary information about all items on your personal worklist. From these pages, you can:

- View additional details about each work item
- Click on a link to work the item
- Sort work items according to the data in that column



# Cardinal Worklists (continued)

You can access these approval items via your **FIN Application** worklist:

- Cash advances
- Change Orders
- Employee Expense Reports
- Journals
- Purchase Orders
- Requisitions (including Restock Requisitions)
- Strategic Sourcing Events
- Travel Authorizations
- Vouchers

You can access these items via your **HCM Application** worklist:

- Reported Time (i.e., Absences)
- Payable Time (i.e., Timesheets)



# Using Your Worklist

Both Cardinal worklists (FIN and HCM) provide a Summary View and Detail View.

When you open your FIN or HCM worklist, a list of items that require your review and/or approval appears. Click on any of the column heading to sort items in ascending or descending order. Click on a link to view and/or work the item.

Worklist for LPE23978: SNYDER, MAE T.

Work List Filters: [dropdown] Feed [dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link		
SMITH, SUSAN	11/08/2012	Approval Routing	Approval Workflow	3-Low [dropdown]	<a href="#">voucherApproval: 175883_50100_1901-01-02_N.O.</a> <a href="#">BUSINESS UNIT:15100</a> <a href="#">VOUCHER ID:00000008</a> <a href="#">RDC:RA.0.A</a>	Mark Worked	Reassign

Refresh



# Using Your Worklist (continued)

From	Date From	Work Item	Worked By Activity	Priority	Link	
SMITH, SUSAN	11/08/2012	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval_175883_50100_1901-01-02_N_0_BUSINESS_UNIT:15100_VOUCHER_ID:00000008_RDC:RA.0.A</a>	Mark Worked Reassign

Each column of the worklist provides details about an item:

- **From:** Identifies the user or functional area that processed and submitted the item
- **Date From:** Displays when the item was submitted
- **Work Item:** Displays the type of item (e.g., Approval Routing, Transaction Approved, etc.)
- **Worked By Activity:** Provides additional information on the type of item
- **Priority:** Allows you to assign a priority to items in your worklist. Items are automatically assigned a priority level based on the type of transaction. You may change these priorities as needed.
  - **Blank**-No priority
  - **1-High**
  - **2-Medium**
  - **3-Low**
- **Link:** Takes you to the page where you can review the item in more detail and process the approval. The link description contains transaction type and number, e.g., Voucher Approval and Voucher ID 00000008.



# Using Your Worklist (continued)

- **Mark Worked:** Manually marks an item as worked. Most items are automatically marked as worked after they are processed. Clicking the **Mark Worked** button removes the item from your list. You cannot mark an item as worked when the **Mark Worked** button is grayed out.
- **Reassign:** Is not used on the worklist. Reassignments of some items can be completed on the **Monitor Approvals** page if you have the appropriate role. Some roles allow users to reassign expenses under **Travel and Expenses > Manage Expenses Security > Reassign Approval Work**.

Worklist for LPE23978: SNYDER, MAE T.

Work List Filters: [ ] Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
SMITH, SUSAN	11/08/2012	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 175883, 50100, 1901-01-02, N. O. BUSINESS UNIT:15100 VOUCHER ID:00000008 RDC:RA.0.A</a>	Mark Worked	Reassign



# Using Your Worklist (continued)

Worklist for UJK365897: SMITH, SUSAN

Summary View Work List Filters: [dropdown] Feed [dropdown]

From	Date From	Work Item	Priority	Worked By Activity	Business Process Name	Link		
DOE, JOHN	11/08/2012 11:23:17AM	Approval Routing	3-Low [dropdown]	Approval Workflow	EOAW_APPROVALS	<a href="#">VoucherApproval_175883_50100_1901-01-02_N_0_BUSINESS_UNIT:15100_VOUCHER_ID:00000008_RDC:RA.0.A</a>	Mark Worked	Reassign

Timed Out Dttm	Previous User	Selected Dttm	Activity Name	Comment	Timed Out	Instance	Transaction
			EOAW_ROUTE			883172	883172

The **Detail View** link expands the item detail to include the following:

- **Business Process Name:** Provides the name of the associated workflow process in Cardinal.
- **Timed Out Dttm:** Not used in Cardinal.
- **Previous User:** Displays the user whose worklist previously listed the item, if reassigned.
- **Selected Dttm:** Displays the date and time you first selected this item to work.
- **Activity Name:** Provides the name of the associated workflow activity in Cardinal.
- **Comment:** Displays information about why an item has been reassigned.
- **Timed Out:** Not used in Cardinal.
- **Instance and Transaction:** Unique number assigned by Cardinal that identifies each item.

Also note the **Date From** field in Detail View includes timestamp information which may be useful in locating specific items on the worklist.



# Worklist Filters

To filter the worklist, select an approval work item from the **Worklist Filters** dropdown menu.

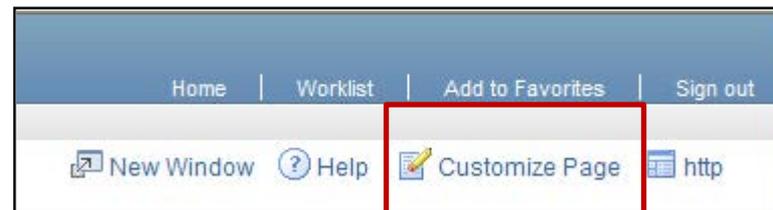
The screenshot shows the CARDINAL application interface. At the top left is the CARDINAL logo. The breadcrumb navigation shows 'Main Menu > Worklist > Worklist'. The page title is 'Worklist for BTW5982: GRAY, JOEL S.'. Below the title is a 'Detail View' link. A 'Work List Filters:' dropdown menu is highlighted with a red box, and its dropdown list is open, showing 'Approval Routing' selected. To the right of the dropdown is a 'Feed' button. Below these elements is a table with the following data:

From	Date From	Work Item	Worked by Activity	Priority	Link		
SMITH, SUSAN	11/08/2012	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 175883, 50100, 1901-01-02, N, 0, BUSINESS UNIT: 15100, VOUCHER ID: 00000008, RDC:RA0,A</a>	Mark Worked	Reassign



# Worklist – Customize Page

To customize the tab order/views, click on the **Customize Page** link.



**Page Customization**

Save the state of the View All settings on this page.  
 Save tabbing order customized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence.  
This new Tab order setting may be overridden by the people code command SetCursorspos().  
To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

Include In Tabbing Order  Remove From Order  Move Up In Order  Move Down In Order

Worklist for TOO59087: MANN, JOE K.

From	Date From	Work Item	Worked By Activity	Priority	Link
DOE, JOHN	11/08/2012	Approval Routing	Approval Workflow	3-Low	VoucherApproval.175883_50100. 1901-01-02_N.O. BUSINESS_UNIT:15100 VOUCHER_ID:00000008 RDC:RA0A



# Worklist – Approving Items

When you click on a worklist item link, the approval page for that item opens so you can work the item.

Here is an approval page for a voucher. In addition to approving the item, you can also review the item's approval path and the status of its approvals.

**Approval Framework - Vouchers**

Approval | Line Information | Charge Information

Business Unit: 15100 Invoice Number: 01AP0505  
Voucher: 00000008 Vendor: XEROX Corp  
Invoice Date: 10/01/2012 ID: 0000066838

**Voucher Details**

Transaction Currency:	USD	Terms:	Net 30
Total:	516.95	Approval Status:	Pending
Misc Amt:	0.00	Added By:	SMITH, SUSAN
Freight:	0.00		Voucher Processor
Sales Tax:	0.00		<a href="#">Attachments (0)</a>
Use Tax:	0.00		
Entered VAT:	0.00		

**Details** | Customize | Find | View All | First | 1 of 1 | Last

Remit SetID	Remit Vendor	Name 1	Name 2
STATE	0000066838	XEROX Corp	

**Voucher Approval**

**BUSINESS\_UNIT=15100, VOUCHER\_ID=00000008: Pending** [Start New Path](#)

COVA Standard Voucher Approval

**Pending**

[Multiple Approvers](#)

COVA Standard Voucher Approver [+](#)

Submit Approve Deny Pushback Add Comments



# Worklist – Approving Items (continued)

Click on the link in the workflow box to see all the approvers the transaction was routed to for that specific level of approval.

**Voucher Approval**

Business Unit: BUSINESS\_UNIT=15100, Voucher ID: VOUCHER\_ID=00000130: Pending

COVA Standard Voucher Approval

Pending

**Multiple Approvers** (highlighted with a red box)

COVA Standard Voucher Approver

Start New Fall

Approver #1	
Name:	Doe, John
Description:	Doe, John
Approver #2	
Name:	Brown, Joe
Description:	Brown, Joe

**Close**

If the word **Skipped** appears in the box, the transaction has a workflow routing error and has been sent to the appropriate workflow administrator. Links in the **Pending** box show whose worklist the item is currently on. The **Not Routed** box shows future approver(s) the item will be routed to.

**Voucher Approval**

Business Unit: BUSINESS\_UNIT=50100, Voucher ID: VOUCHER\_ID=00106982: Pending

Regular Voucher Approval

**Skipped** (highlighted with a red box)

No Approvers Found  
Voucher Processor Supervisor

**Pending** (highlighted with a red box)

Multiple Approvers  
HR Representative

**Not Routed** (highlighted with a red box)

Multiple Approvers  
Final Approver

Return



# Reassigning Items on Your Worklist

Because Cardinal uses two separate applications (FIN and HCM), you must designate an approver in each of the applications when you need to reassign all of your approvals. Because there are two applications you have the option of assigning your FIN and HCM worklists to different approvers.

Make sure you identify an approver who is assigned the security needed to handle your approvals. Check with your Cardinal Coordinator if you are unsure.



# Delegating Worklist Items in Cardinal's HCM Application

HCM worklist items include **Reportable Time** and **Payable Time**. Users typically delegate their HCM worklist items to a proxy when they know they will be unavailable to approve Time & Attendance items. Time reporting is generally deadline driven, so delegation can be critical.

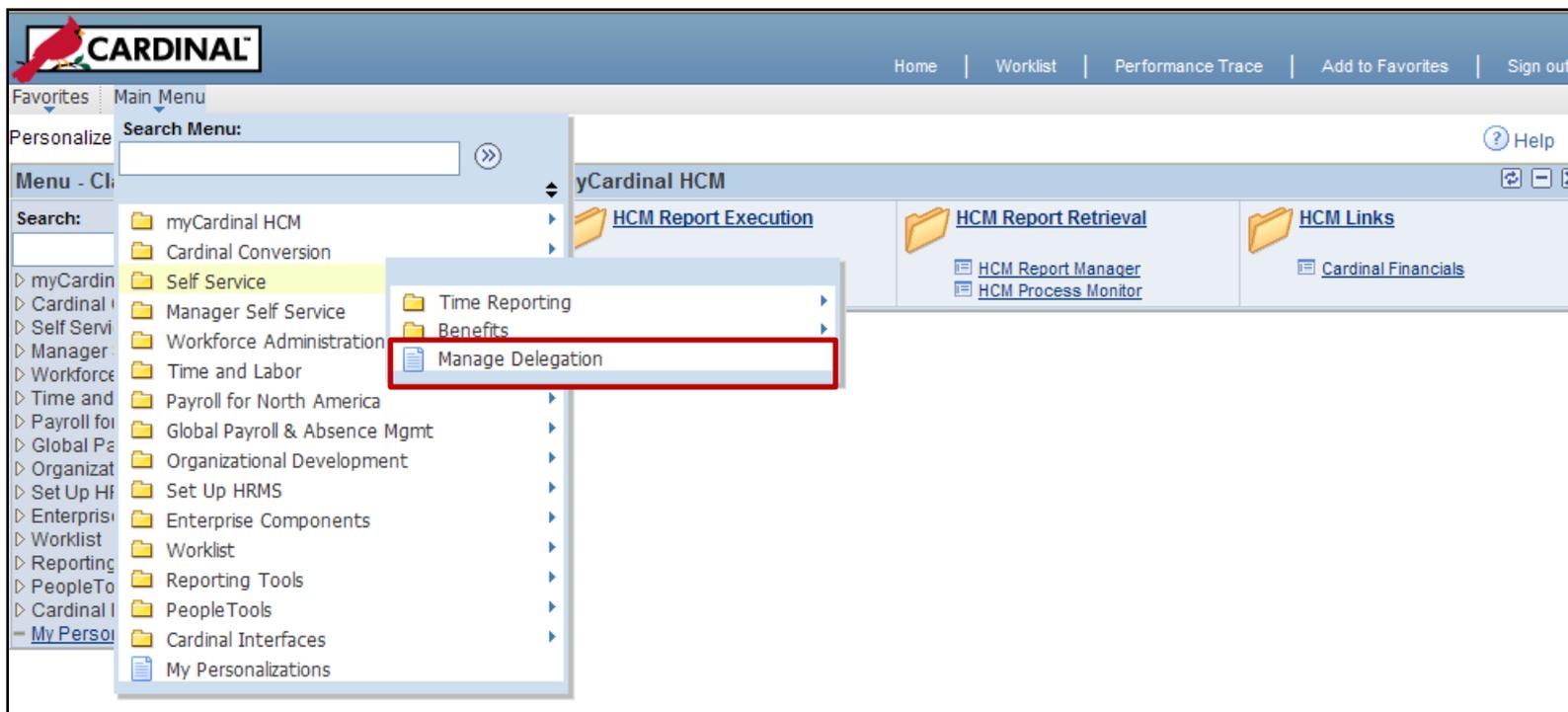
When you delegate your worklist items in Cardinal HCM, the user or proxy that you name must accept the worklist delegation. Existing worklist items only move to the proxy's worklist when the proxy accepts the worklist delegation.



# Delegating Worklist Items in Cardinal's HCM Application (continued)

To **Delegate** your worklist in the Cardinal HCM application, go to the **Manage Delegation** page using the following path:

**Main Menu > Self Service > Manage Delegation**





# Delegating Worklist Items in Cardinal's HCM Application (continued)

From the Manage Delegation page you can:

- **Create Delegation Request** – choose transactions to delegate and proxies to review / approve HCM transactions on your behalf
- **Review My Proxies** – look at transactions that you have delegated and see the proxy for each one
- **Review My Delegated Authorities** – look at transactions that have been delegated to you by other users, and accept or reject those requests

The **TA365: Time and Attendance Approvals** course provides details on approving employee time, including absences.

**CARDINAL** Home | Sign out

Favorites | Main Menu > Self Service > Manage Delegation

## Manage Delegation

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

[Review My Delegated Authorities](#)



# Assigning Alternate Approvers in Cardinal's FIN Application

Cardinal's FIN application also allows approvers to reassign their worklist items to another user.

In the Cardinal FIN application, you can assign an alternate approver to work items for a specified period of time. This allows you to assign your approvals when you know you are going to be out of the office. Only future items will route to the alternate approver you designate. You must work the existing items on your worklist, or have a workflow administrator reassign them to the alternate approver. Once items are routed to the alternate approver, they will not route back to you at the end of the reassignment period. The alternate approver must work all worklist items during the reassignment period or have a workflow administrator reassign them back to you.

Alternate approvers must have the appropriate security roles for approval process in order to access those items.

Only a workflow administrator can reassign the worklist items once they are routed to an approver. You will either need to work your existing worklist items or request that your workflow administrator reassign them. All worklist items routed to your alternate approver stay on their worklist. They do not route back to the original approver's worklist at the end of the reassignment period.



# Assigning Alternate Approvers in Cardinal's FIN Application (continued)

To assign an **Alternate User** as an approver in the Cardinal Financials application, go to the My System Profile page. You can navigate to this page through the following path:

**Main Menu > My System Profile**





# Assigning Alternate Approvers in Cardinal's FIN Application (continued)

The steps to assign an Alternate Worklist Approver are:

- In the **Alternate User ID** field, enter the **User ID** of the alternate approver (Use the **Lookup** button if you do not know the User ID.)
- Use the **From Date** and **To Date** fields to specify the date range you want items routed to your alternate approver
- Click the **Save** button to make your changes active

Always follow up with your alternate approver at the end of the reassignment period to determine the status of outstanding worklist items.

My System Profile

### General Profile Information

Voucher Approver

**Password**

[Change password](#)  
[Change or set up forgotten password help](#)

**Personalizations**

My preferred language for PIA web pages is: English  
My preferred language for reports and email is: English  
Currency Code: USD  
Default Mobile Page:

**Alternate User**

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

From Date:  (example: 12/31/2000)  
To Date:  (example: 12/31/2000)

**Workflow Attributes**

Email User  Worklist User

**Miscellaneous User Links**

Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	<input type="text"/>

**Instant Messaging Information**

Protocol	XMP Domain	User ID	Password
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Alternate User**

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

From Date:  (example: 12/31/2000)  
To Date:  (example: 12/31/2000)



# Adding Approvers / Reviewers to Workflow in Cardinal's FIN Application

Depending on the work item and your security, you may be able to insert additional approvers or reviewers to a FIN item's workflow.

**If you insert an approver, the item does not continue through workflow until the inserted approver takes action.**

If you insert a reviewer, the item continues through workflow. A reviewer can add comments but cannot approve or deny an item, so the reviewer's input does not affect workflow. The item routes to the next level regardless of the reviewer's comments.

Additional approvers or reviewers must be added to workflow at specific points in time:

- If you are the work item creator, you must add approvers/reviewers before submitting the item for approval.
- If you are an approver of the work item, you can only add approvers / reviewers **before** clicking the **Approve** button.

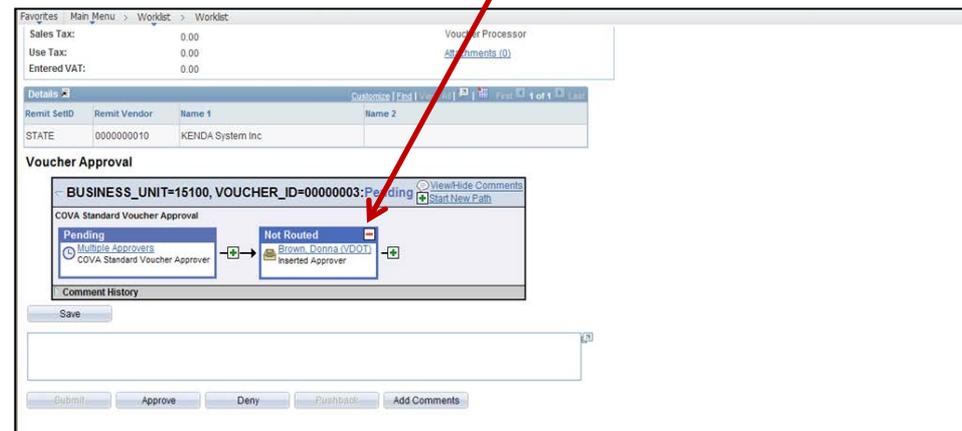
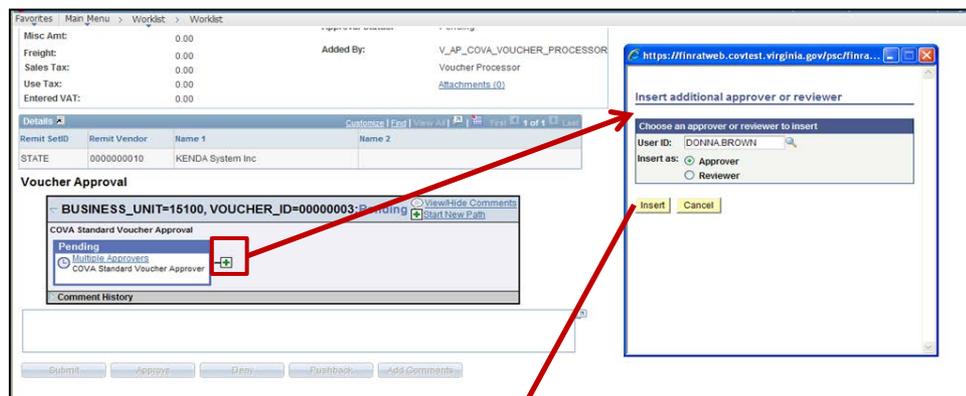


# Adding Approvers / Reviewers to Workflow in Cardinal's FIN Application (continued)

In Cardinal's FIN application, the steps to insert an additional approver or reviewer are:

- Access the approval page for the item that requires an additional approver or reviewer.
- Click the **+** button (Insert Approvers).
- In the window that opens, enter the approver/reviewer's User ID (You may use the **Insert additional approver or reviewer Look Up** icon.).
- Specify whether this person should be an approver or a reviewer, and click the **Insert** button.
- Click the **Save** button.

The **Start New Path** links are not used. Do not click on these links.





# Pooled Worklist in Cardinal's FIN Application

Some worklists in the Cardinal Financials application are shared among multiple approvers in Cardinal. These worklists are called **pooled worklists**.

With a pooled worklist, all worklist approvers receive copies of shared work items. For example, vouchers may have multiple levels of approval. At one approval level, vouchers may be routed to a pooled worklist where they are available to multiple users. When a user selects and works an item on a pooled worklist, it is removed from the pooled worklist.

With a non-pooled worklist, an item routes to only one user at a time.



# Worklist – Error Items / Reassignment of Items

In Cardinal, the **Monitor Approvals** page is used to reassign specific worklist items and to process workflow items with routing errors.

Workflow administrators use the **Monitor Approvals** page to:

- Process workflow items with routing errors
- Reassign specific worklist items to an alternate approver's worklist.

Contact your workflow administrator with any issues related to routing errors or reassignment of items currently on your worklist.

Exception: Travel and Employee Expense worklist items are reassigned on the **Reassign Approval Work** page, rather than the **Monitor Approvals** page. An expense coordinator or expense administrator can reassign Travel and Employee Expense worklist items to an alternate approver, using the following path:

**Main Menu > Travel and Expenses > Manage Expenses Security > Reassign Approval Work.**

See the **Reassign Employee Expense Approvals** job aid for more details.



# Lesson Summary

In this lesson, you learned:

- A worklist contains information about each item that requires review or action, including a link to the page where it can be approved.
- Cardinals has a worklist for each of its two applications. The HCM application has a worklist and the FIN application has a worklist.
- You can delegate your HCM worklist items to a proxy.
- You can assign your FIN Cardinal worklist to an alternate approver.
- Not all users can reassign worklist items. Access to reassign worklist items is restricted to users with certain roles in Cardinal.



# Approvals By Functional Area

Detailed instructions for approving specific items in Cardinal are included in these 300 level courses available through the VDOT Virtual Campus.



## Accounts Payable

- AP318: Accounts Payable Approvals



## Accounts Receivable

- AR325: Accounts Receivable Approvals



## General Ledger

- GL333: Approving Journals



## Procurement

- PR343: Procurement Approvals



## Time & Attendance

- TA365: Time and Attendance Approvals



# Course Summary

In this course, you learned:

- Cardinal uses two separate applications: Financials (FIN) and Human Capital Management (HCM). Each application has its own worklist.
- Many users have an HCM worklist where they approve reported time (e.g., absences) and payable time (e.g., timesheets) for employees they supervise.
- Users may also have a FIN worklist where they approve transactions entered in the Cardinal Financial application.
- Not all items needing approval appear on your worklist. The type of item determines which items will appear on your worklist in Cardinal.
- A worklist contains information about each item that requires review or action, including a link to the page where it can be worked.



# Course Summary (continued)

- You can use various paths to access an item. You can:
  - Access your Cardinal worklist and click on the link to the item
  - Navigate directly to the related page to approve the item
- You can add additional approvers or reviewers on an item you have not yet approved. Once you approve an item you cannot add approvers or reviewers.
- If you add additional approvers, they must approve before the item can be processed. Reviewers only offer comments, so processing is not affected.
- Access to reassign worklist items is limited to users with certain roles.
- Approvers may delegate their HCM approval worklist and assign an alternate approver to their FIN worklist. A user's HCM and FIN worklists may be assigned to two different users.



# Course Evaluation

Congratulations! You successfully completed the **NAV210: Introduction to Approvals** course. Please use the evaluation link to assess this course.

[Click here to access the survey](#)

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the Exit Course button.

