



Assigning Alternate Approvers Overview

The Cardinal Financials (FIN) application allows approvers to reassign their Worklist items to another user. The user can assign an alternate approver to work items for a specified period of time. This allows the user to assign the approvals when the user is going to be out of the office.

Only future items will route to the alternate approver that is designated. The user must work the existing items on their 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 the user 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 the user.

Navigation Note: Please note that there may be a Notify button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History2
Assigning Alternate Approvers3



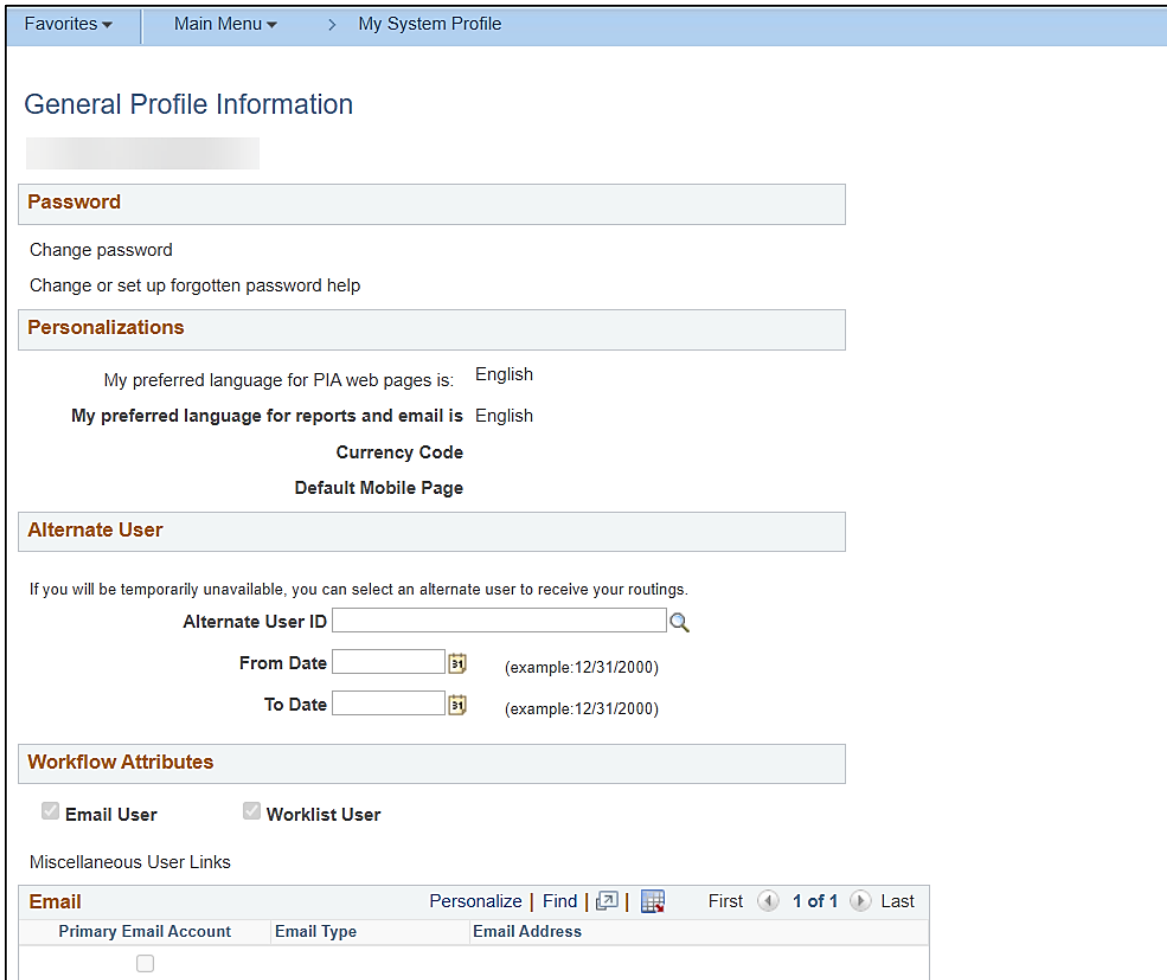
Revision History

Revision Date	Summary of Changes
1/26/2025	Baseline

Assigning Alternate Approvers

Step	Action
1.	Navigate to the General Profile Page using the following path: Main Menu > My System Profile

The **General Profile Information** page displays.



Favorites ▾ Main Menu ▾ > My System Profile

General Profile Information

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
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

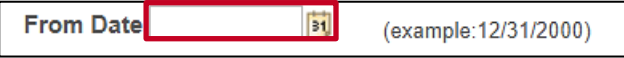



Email User Worklist User

Miscellaneous User Links

Email Personalize | Find |   First  1 of 1  Last

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

2.	<p>In the Alternate User section, click the Alternate User ID Look Up icon and select the User ID for the alternate approver.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>If you will be temporarily unavailable, you can select an alternate user to receive your routings.</p> <p>Alternate User ID <input style="border: 2px solid red;" type="text"/> </p> </div>
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Step	Action
3.	Click the From Date Calendar icon and select the date wanted for items to start routing to the alternate approver. 
4.	Click the To Date Calendar icon and select the date wanted for items to stop routing to the alternate approver. 
5.	Click the Save button to save the changes made. 
	Always follow up with the alternate approver at the end of the reassignment period to determine the status of outstanding worklist items.