

How to Redirect Items in Everest/K2

1. Sign in to the “My Everest Workspace” using your MyBama login credentials



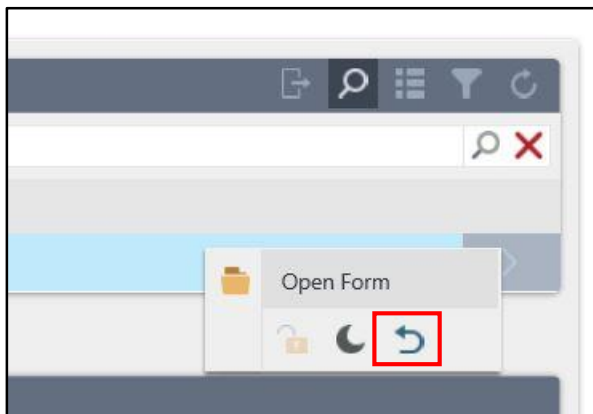
The screenshot shows the login interface for the Everest system. On the left, there are two input fields: "User Name:" with a placeholder "Type your user name" and "Password:" with a placeholder "Type your password". Below these fields is a "Sign In" button. To the right of the input fields is the Everest logo, which consists of a circular emblem containing a mountain range and the word "EVEREST" below it. To the right of the logo, the text reads "Sign In" in green, followed by "Sign in with your MyBama user name and password to access this site. If you do not have access, contact your administrator." Below this text is a "Help" link in green.

2. Click the right arrow on the line for the item you want to redirect



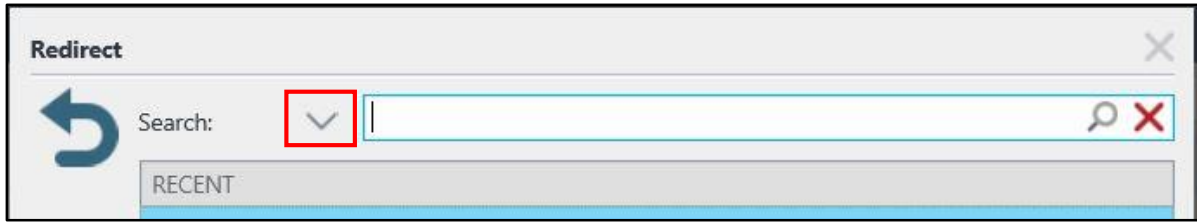
The screenshot shows the main dashboard of the Everest system. At the top left is the "THE UNIVERSITY OF ALABAMA" logo. At the top right is the Everest logo. Below the logos, there is a "Welcome Administration, Contract" message with a "Sign Out" link. The main area is a "Worklist" table with columns for "ACTIVITY NAME", "FOLIO", "TASK START DATE", and "WORKFLOW NAME". The table contains one row: "Contract Admin Approval", "CID: 968, CNum: 2, PNum: 847-16-751, Phase: B", "11:15 AM", and "CORAF". A red box highlights a right-pointing arrow icon at the end of this row. Below the table is a "Workflow Instances" section with a link to "Last 90 Days (6/24/2017-9/21/2017)".

3. Click the redirect arrow

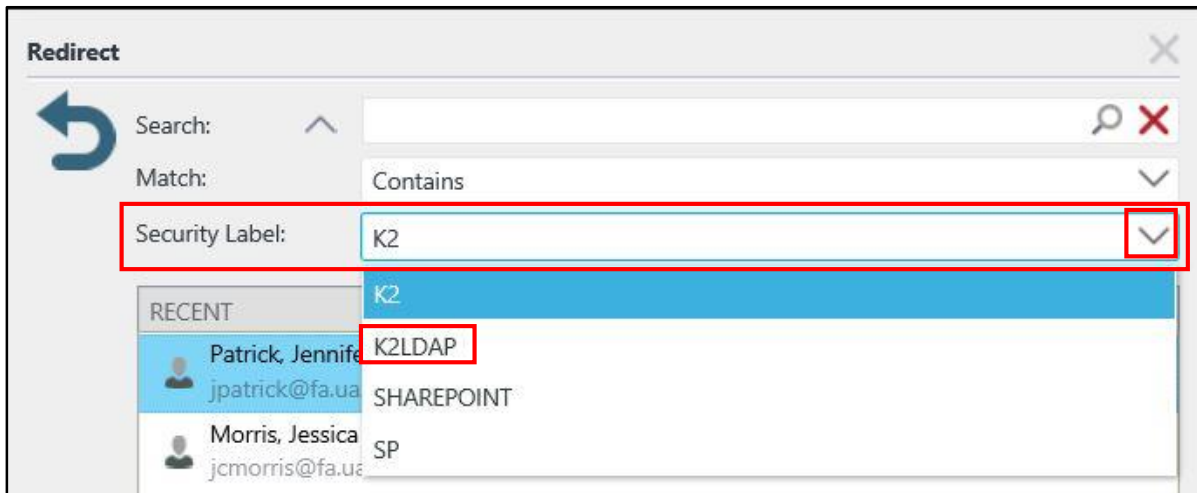


The screenshot shows a close-up of the context menu for a workflow item. The menu is open, showing options like "Open Form", "Lock", "Unlock", and "Refresh". A red box highlights the "Refresh" icon, which is a circular arrow.

4. Click the down arrow



5. Click the down arrow in the "Security Label" field then select "K2LDAP"

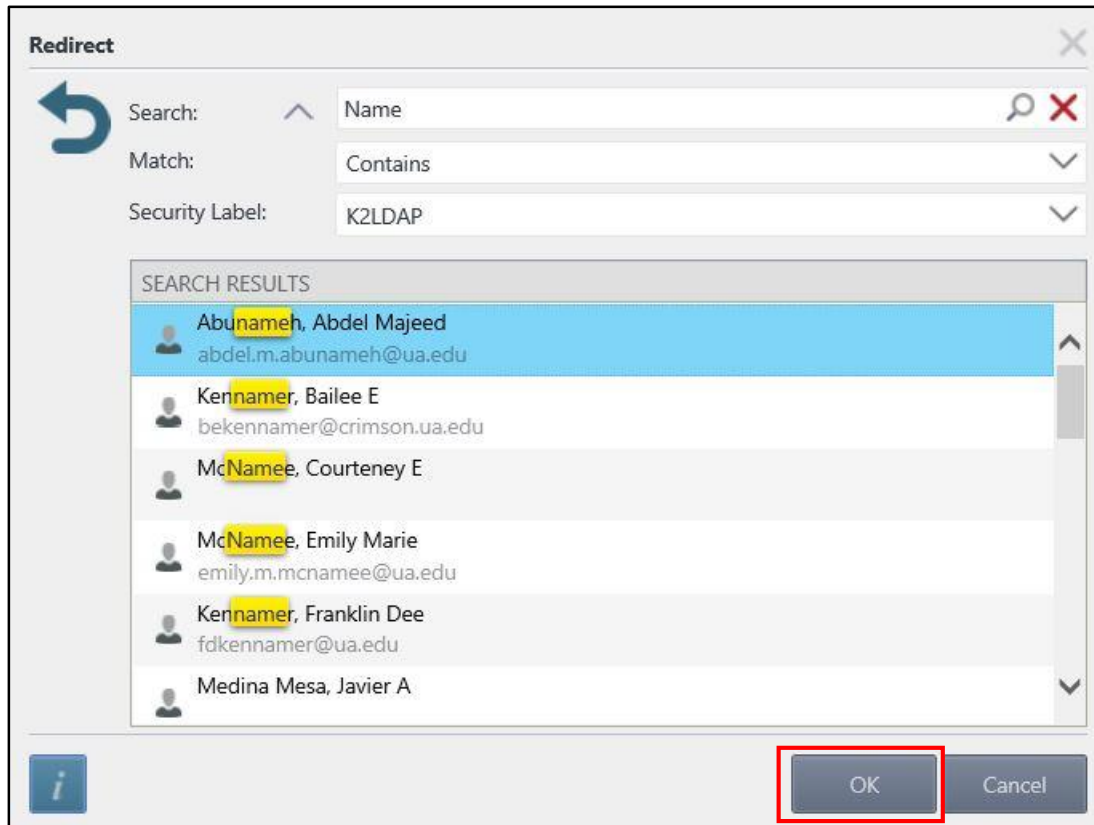


Note: If you redirect using "K2" Security Label instead of "K2LDAP," the item will not be received by the person you are redirecting to and the item will no longer appear on your workspace. If this occurs, contact Financial Affairs Information Technology.

6. Enter the name of the person to whom you are redirecting and click the search icon



7. Scroll through the list, click the correct name, then click “OK”



8. The item will be removed from your workspace and moved to the person to whom you redirected.