

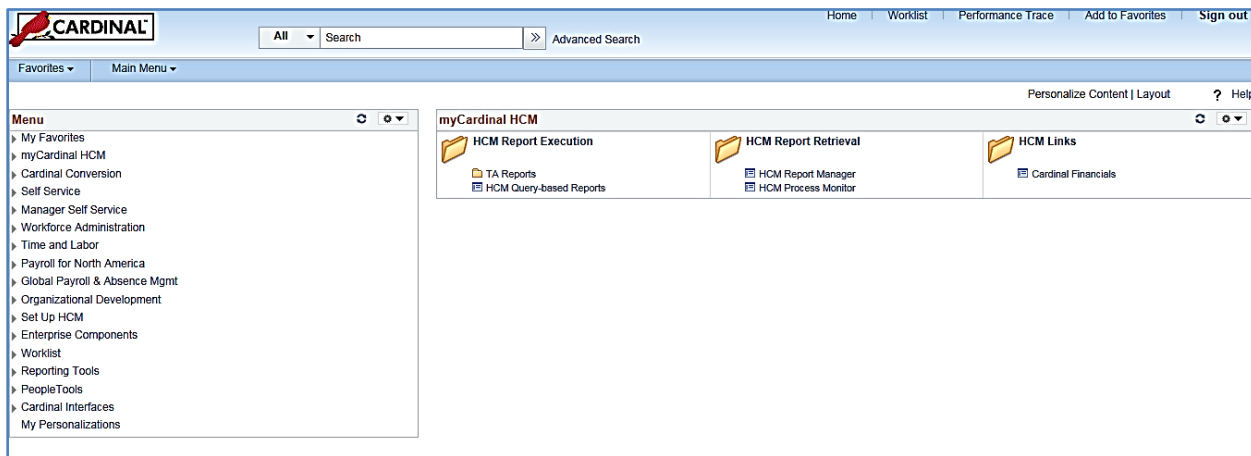
501 TA365 Delegating Another Employee's Worklist

About Delegate Another Employee's Worklist

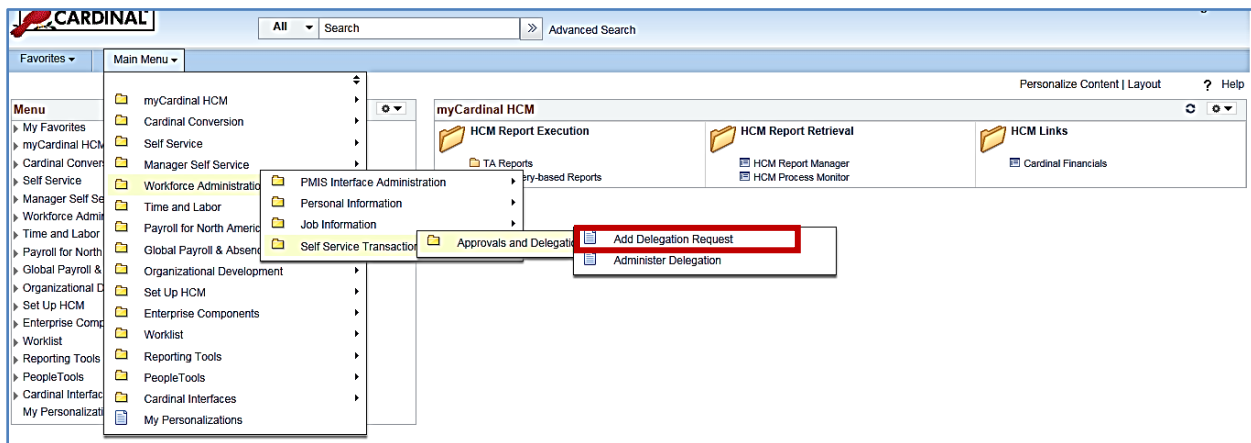
This document provides the step-by-step instructions used to delegate the Worklist from one employee (Approver) to another (Proxy Approver). Note that this functionality is only available to employees who have the Delegator security role.

Delegating An Employee's Worklist

The following steps show how to delegate another employee's worklist.



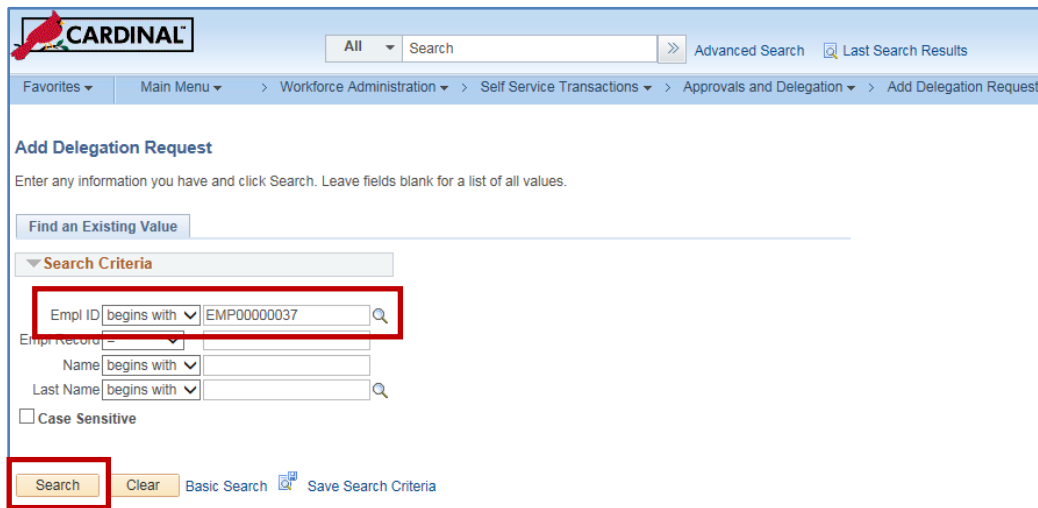
1. Sign into Cardinal and access **Cardinal HCM**.



2. Navigate using the following path:

Main Menu > Workforce Administration > Self Service transactions > Approvals and Delegation > Add Delegation Request

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Search Criteria

Empl ID begins with EMP00000037

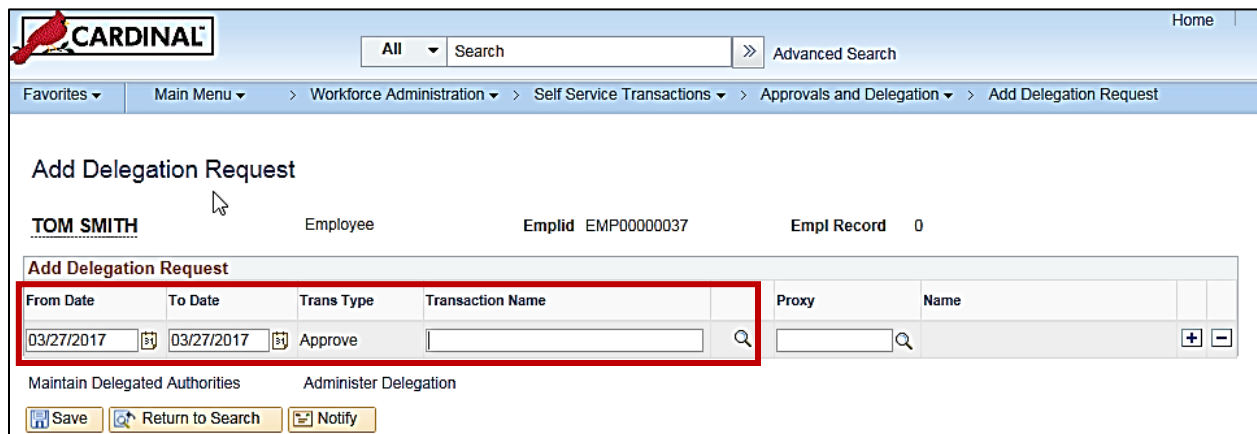
Name begins with

Last Name begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

3. The **Add Delegation Request** page displays. Enter the **Empl ID** of the person that you need to delegate the work from. If you don't know it, you can search by using **Name** (first name) or **Last Name**.
4. Click the **Search** button. If there is only one employee based on the criteria entered, the **Add Delegation** page displays.
5. If more than one employee meets the criteria entered, the **Search Results** section displays at the bottom of the page. You can select the employee from this list by clicking the **Empl ID** link.



Add Delegation Request

TOM SMITH Employee Emplid EMP00000037 Empl Record 0

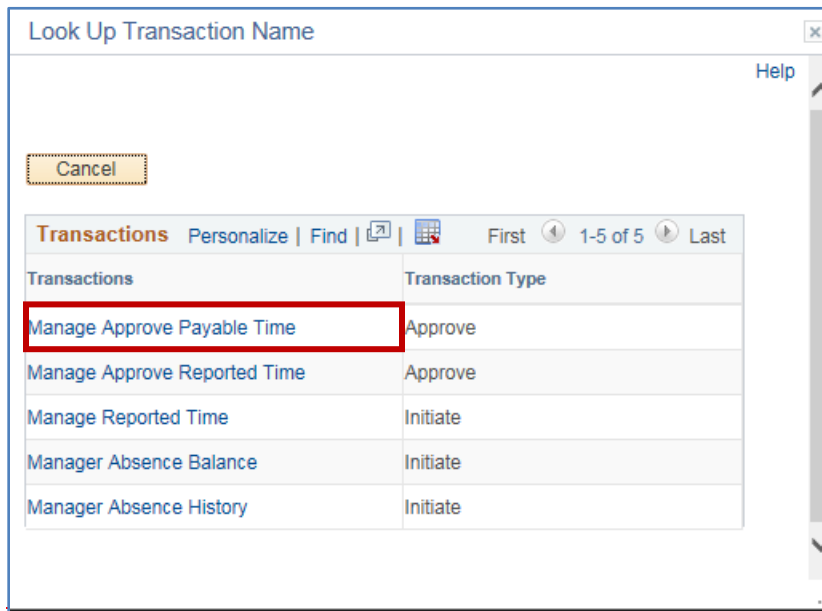
From Date	To Date	Trans Type	Transaction Name	Proxy	Name
03/27/2017	03/27/2017	Approve			

Maintain Delegated Authorities Administer Delegation

Save Return to Search Notify

6. Enter **From Date**. If transactions need to be approved right away, populate the **From Date** field with the current date.
7. Enter **To Date**. This is the date the delegation should end.
8. Select **Transaction Name** by clicking the lookup button.

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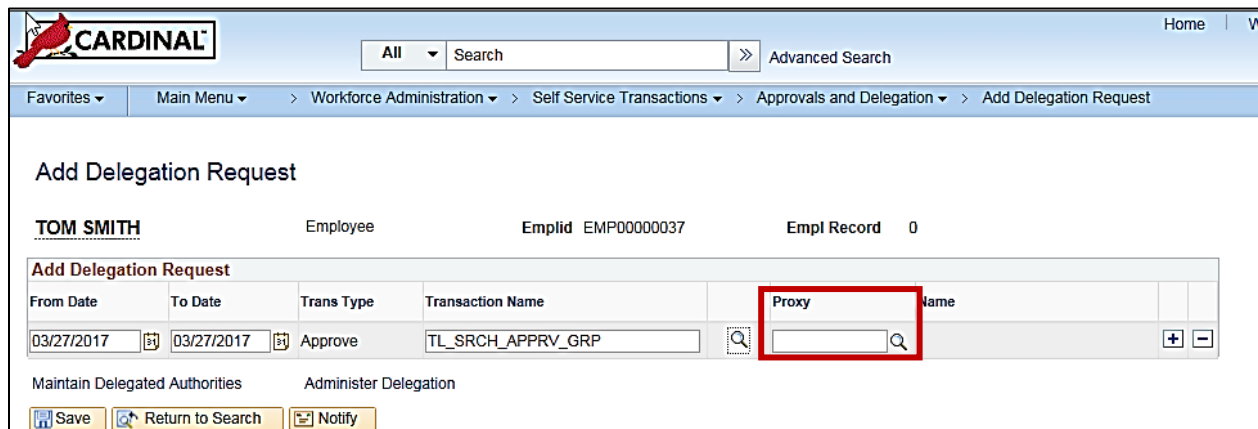
Look Up Transaction Name

Cancel

Transactions Personalize | Find | First 1-5 of 5 Last

Transactions	Transaction Type
Manage Approve Payable Time	Approve
Manage Approve Reported Time	Approve
Manage Reported Time	Initiate
Manager Absence Balance	Initiate
Manager Absence History	Initiate

9. The Transactions list appears. Click the **Transaction**, e.g., **Manage Approve Payable Time**, from the list. Typically, you should add all transactions to delegate.



CARDINAL

All Search Advanced Search

Favorites Main Menu Workforce Administration Self Service Transactions Approvals and Delegation Add Delegation Request

Add Delegation Request

TOM SMITH Employee Emplid EMP00000037 Empl Record 0

From Date	To Date	Trans Type	Transaction Name	Proxy	Name
03/27/2017	03/27/2017	Approve	TL_SRCH_APPRV_GRP		

Maintain Delegated Authorities Administer Delegation

Save Return to Search Notify

10. Enter **Proxy**. Enter Employee ID of the person you are delegating the transaction(s) to. Make sure the person you are delegating to has the Approver role.
11. Click on the plus sign + to add another row if you want to delegate additional transactions and repeat steps 8 – 11 until you have added all the desired transactions. Typically, you should add all transactions to delegate.



Time & Attendance Job Aid

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Home | Worklist

All Search >> Advanced Search

Favorites > Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

Add Delegation Request

TOM SMITH Employee Emplid EMP00000037 Empl Record 0

From Date	To Date	Trans Type	Transaction Name	Proxy	Name		
03/27/2017	03/27/2017	Approve	TL_SRCH_APPRV_GRP	00000348700	JOHN DOE	+	-
03/27/2017	03/27/2017	Approve	TL_MSS_EE_SRCH_PRD	00000348700	JOHN DOE	+	-
03/27/2017	03/27/2017	Initiate	TL_MSS_EE_SRCH_PRD	00000348700	JOHN DOE	+	-
03/27/2017	03/27/2017	Initiate	GP_ABS_MGRSS_BAL	00000348700	JOHN DOE	+	-
03/27/2017	03/27/2017	Initiate	GP_ABS_MGRSS_HIST	00000348700 x	JOHN DOE	+	-

Maintain Delegated Authorities Administer Delegation

Save Return to Search Notify

12. Click the **Save** button. Once you click on the **Save** button an email is generated and sent to the proxy as well as to the employee you are delegating the worklist from. The delegation request also displays as a worklist item on the **Worklist** of the proxy.



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Accepting a Delegation Request

The steps below provide step-by-step instructions for the proxy accepting / rejecting a delegation request.

Worklist
Worklist for JAMES.FISK: FISK,JAMES

Detail View Worklist Filters [] Feed []

From	Date From	Work Item	Worked By Activity	Priority	Link		
SMITH,TOM	01/19/2017	Approval Routing	Approval Workflow		Delegation 136850 DelegationRequest 2006-01-19 N.O DELEGATOR ID:EMP00000037 DELEGATOR RCD TRANSACTION NAME:TL SRCH APPRV_GRP TRANS_ALLOWED_A FROM DATE:2017-01-19 RDC:RA.D.A.	Mark Worked	Reassign
SMITH,JOHN	01/19/2017	Approval Routing	Approval Workflow		Delegation 136851 DelegationRequest 2006-01-19 N.O DELEGATOR ID:TSP00000001 DELEGATOR RCD TRANSACTION NAME:TL SRCH APPRV_GRP TRANS_ALLOWED_A FROM DATE:2017-01-19 RDC:RA.D.A.	Mark Worked	Reassign

1. Click on the **Worklist** link.

My Delegated Authorities
JAMES FISK
Fin Svcs Mgr I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted [] Refresh []

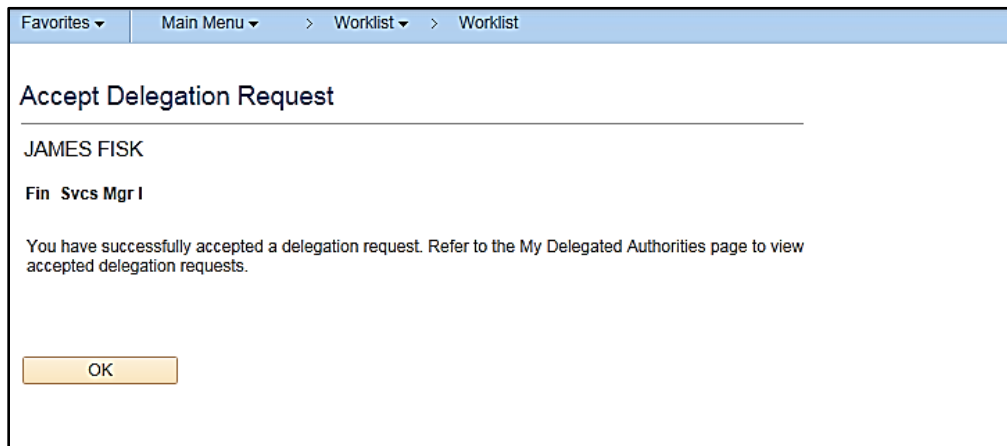
Choose Delegate								
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input checked="" type="checkbox"/>	Manage Approve Payable Time	JOHN SMITH	Fin Svcs Mgr I	01/19/2017	01/19/2017	Submitted	Inactive	[i]
<input checked="" type="checkbox"/>	Manage Approve Payable Time	TOM SMITH	Fin Svcs Specialist I	01/19/2017	01/31/2017	Submitted	Inactive	[i]

Select All Deselect All Accept [] Reject []

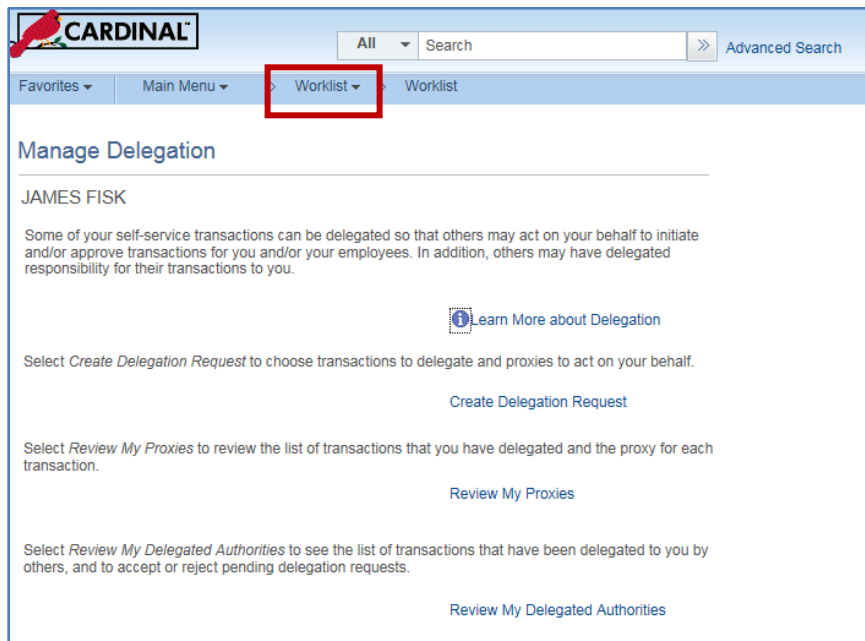
Return to Manage Delegation

2. The **My Delegated Authorities** page displays. Click the checkbox next to each transaction that has been delegated.

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3. Click the **OK** button.



4. The **Manage Delegation** page displays. Click the **Worklist** link.



Time & Attendance Job Aid

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Worklist New Window | Help | Personalize Page

Worklist for JAMES.FISK: FISK,JAMES

Detail View Worklist Filters: Approval Reassign Feed

Worklist Items						Personalize Find View All	First	1-8 of 8	Last
From	Date From	Work Item	Worked By Activity	Priority	Link				
FISK,JAMES	01/19/2017	Approval Reassign	Approval Workflow	3-Low	TLPayableTime: 15761099 TLByPosMgmt: 1901-01-01, N, 0 TRANSACTIONID: 1 EOAWDEFN_ID: TLByPosMgmt EMPLID: EMP00000001 EMPL_RCD: 0 RCD: RS: 1, A	Mark Worked		Reassign	
FISK,JAMES	01/19/2017	Approval Reassign	Approval Workflow	3-Low	TLPayableTime: 15761105 TLByPosMgmt: 1901-01-01, N, 0 TRANSACTIONID: 1 EOAWDEFN_ID: TLByPosMgmt EMPLID: EMP00000002 EMPL_RCD: 0 RCD: RS: 1, A	Mark Worked		Reassign	

- Items that were on the other employee's worklist are now added to the proxy's worklist. These items are noted in the **Work Item** column as **Approval Reassign**. The proxy is now able to access and approve as appropriate.

Note:

If the **From Date** is in the future and not today the proxy will have to wait until that day arrives to be able to accept the delegation. The proxy receives an email on the day the delegation request has been added to either accept or reject the delegation.

Any unapproved worklist items are returned to the originator / delegator when the delegation expires, i.e., when the current date = **From Date** entered on the delegation request.