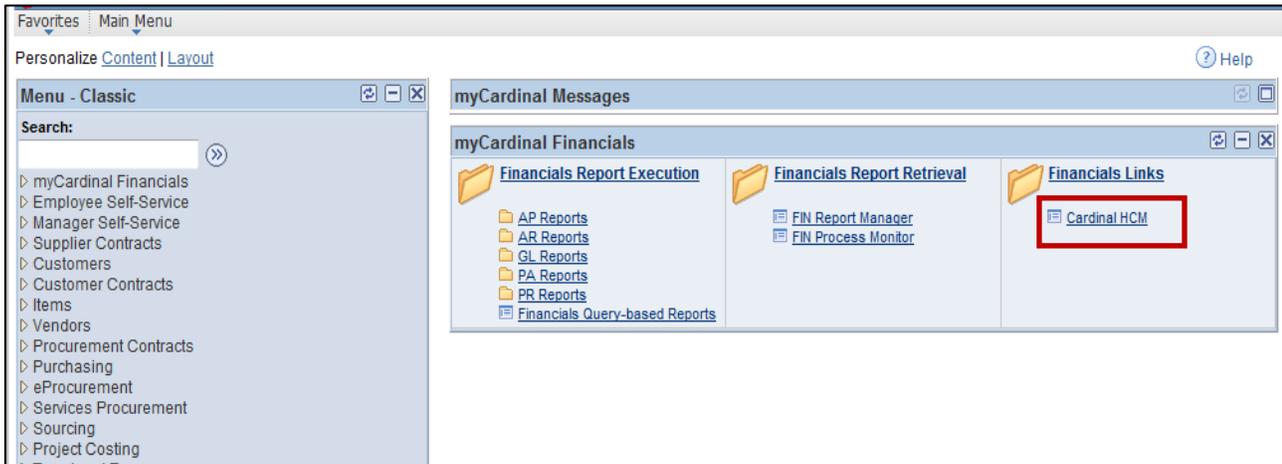
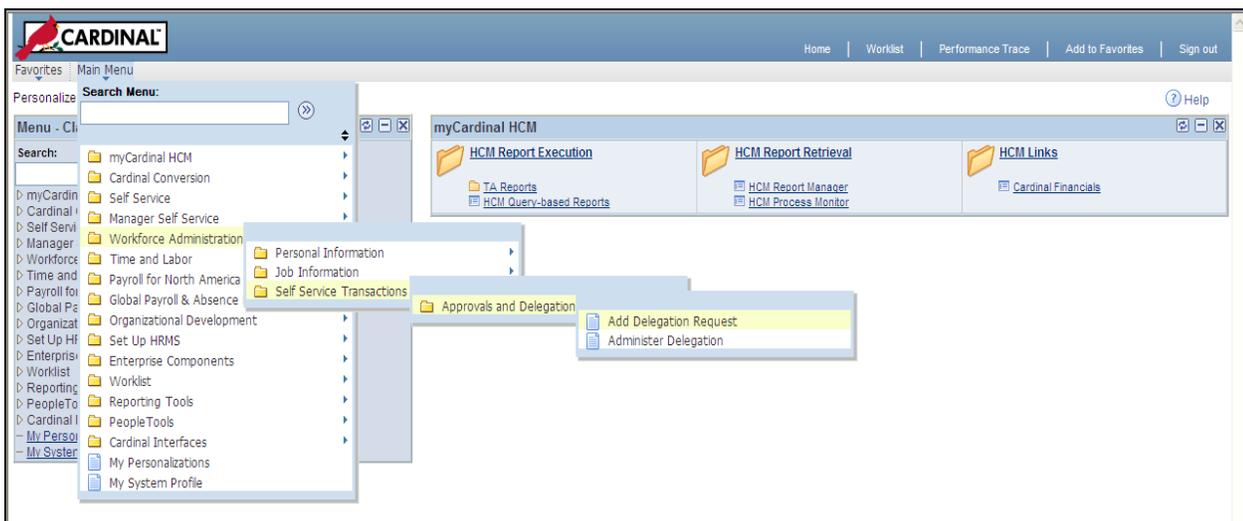


Delegate Another Employee's Worklist

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



- 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 a Delegation Request.

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

Add Delegation Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

EmpID: begins with

Empl Record: =

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 **EmpID** 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 EmpIID** link.

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

New Window Help Customize Page http

Add Delegation Request

Bob Builder Employee EmpId: 00248439000 Empl Record: 0

From Date	To Date	Trans Type	Transaction Name	Proxy	Name	Notify Delegator
11/19/2012	11/30/2012	Approve	TL_SRCH_APPRV_GRP	<input type="text" value="002878471"/>	Kathy Cleaner	<input checked="" type="checkbox"/>

Maintain Delegated Authorities Administer Delegation

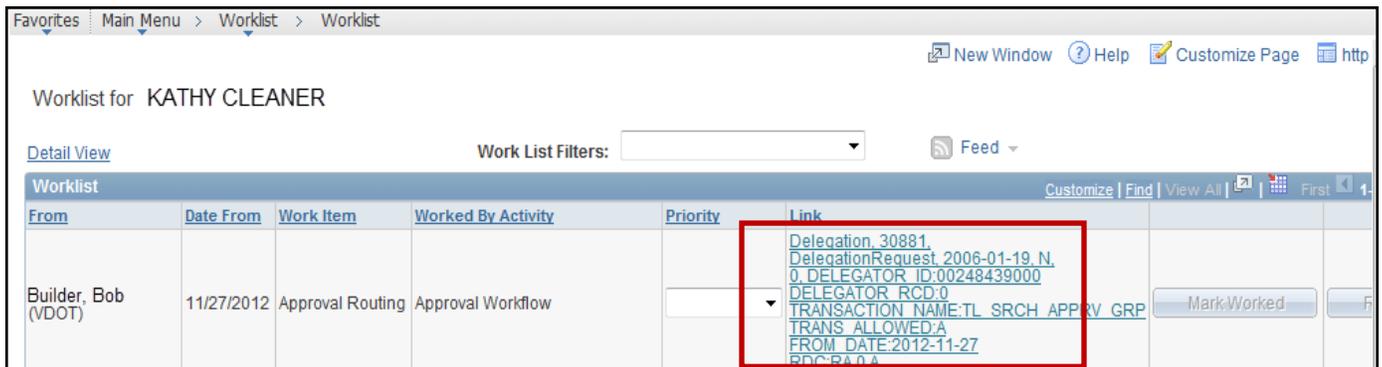
Save Return to Search Previous in List Next in List Notify

- 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 and selecting the desired transaction from the list.

Delegating Another Employee's Worklist

Transactions	Transaction Type	Description
TL_SRCH_APPRV_GRP	Approve	Delegate the approval of Payable Time
TL_MSS_EE_SRCH_PRD	Approve	Delegate the approval of Reported Time (absences)
TL_MSS_EE_SRCH_PRD	Initiate	Delegate the initiation of Reported Time (absences)
GP_ABS_MGRSS_BAL	Initiate	Delegate the viewing of Absence Balances
GP_ABS_MGRSS_HIST	Initiate	Delegate the viewing of Absence History

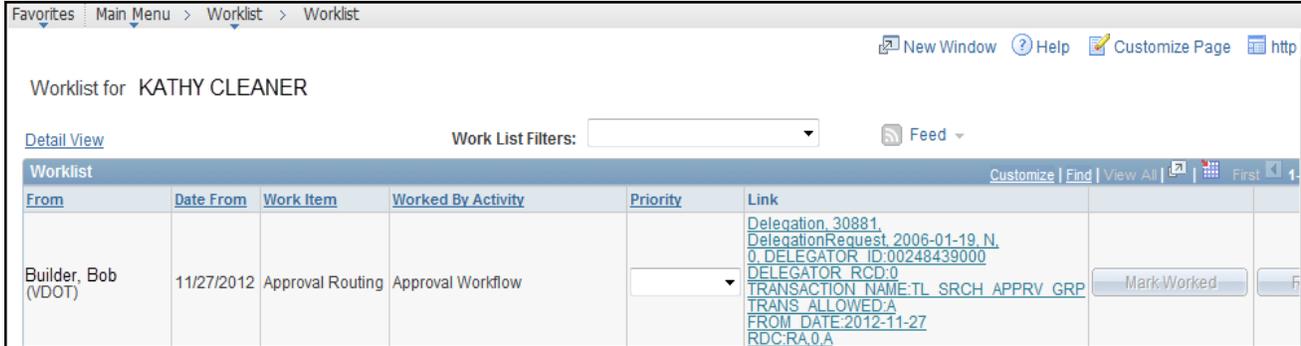
- 9 Enter **Proxy**. Enter Employee ID of the person you are delegating the transaction(s) to. Make sure the person you are delegating to has the approver role.
- 10 Click on the plus sign **+** to add another row if you want to delegate additional transactions and repeat steps 8 – 11 until you have added all the desired transactions.
- 11 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 the delegating the worklist from. In addition, to the email notification, it also displays on the **Worklist** of the proxy.
- 12 The proxy clicks the **Worklist** link.



- 13 A delegation Worklist item displays for the delegation transaction completed.

Accepting a Delegation Request

The steps below provide step-by-step instructions for accepting a delegation request.

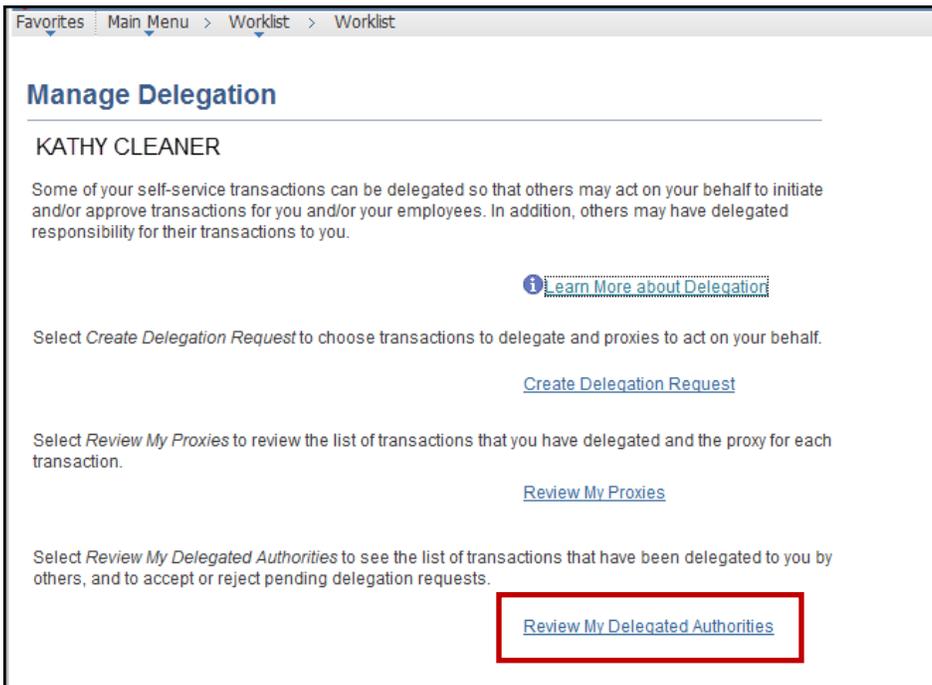


Worklist for KATHY CLEANER

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

From	Date From	Work Item	Worked By Activity	Priority	Link	
Builder, Bob (VDOT)	11/27/2012	Approval Routing	Approval Workflow	[dropdown]	Delegation_30881_DelegationRequest_2006-01-19_N.0_DELEGATOR_ID:00248439000_DELEGATOR_RCD:0_TRANSACTION_NAME:TL_SRCH_APPRV_GRP_TRANS_ALLOWED:A_FROM_DATE:2012-11-27_RDC:RA:0.A	Mark-Worked

1 Click on the **Worklist** link.



Manage Delegation

KATHY CLEANER

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](#)

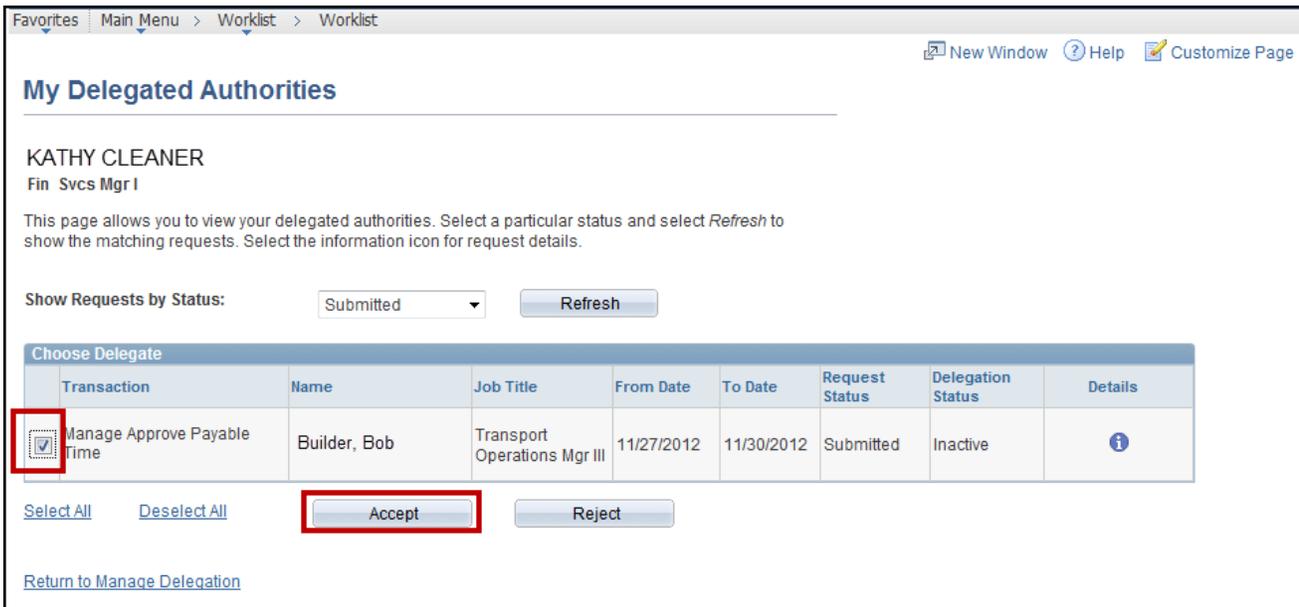
Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[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](#)

2 The Manage Delegation page displays. Click **Review My Delegated Authorities** link.



Favorites | Main Menu > Worklist > Worklist

New Window Help Customize Page

My Delegated Authorities

KATHY CLEANER
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	Builder, Bob	Transport Operations Mgr III	11/27/2012	11/30/2012	Submitted	Inactive		

Select All Deselect All Accept Reject

[Return to Manage Delegation](#)

- 3 Click the check box next to each transaction that has been delegated.
- 4 Click the **Accept** button.



Favorites | Main Menu > Worklist > Worklist

Accept Delegation Request

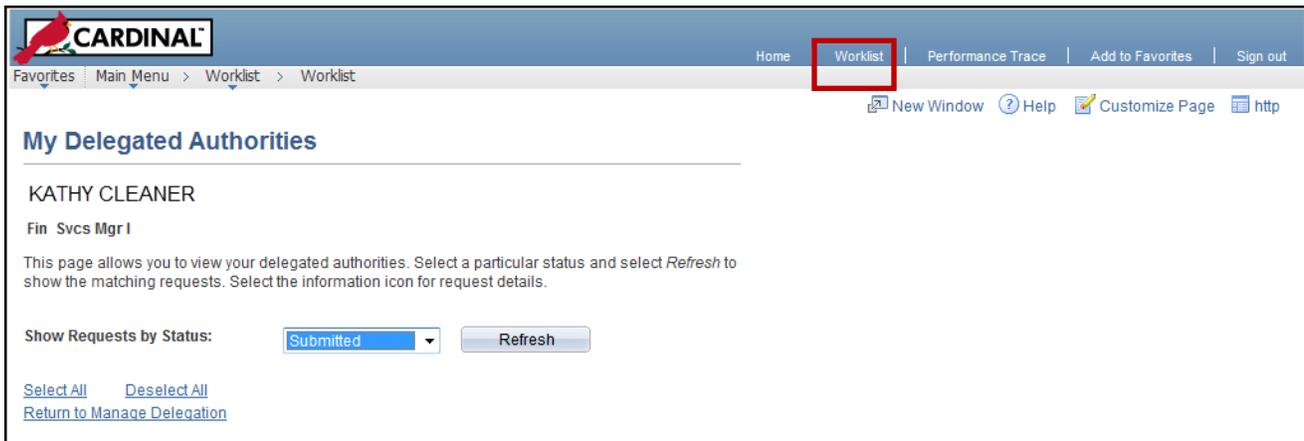
KATHY CLEANER
Fin Svcs Mgr I

You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.

OK

- 5 The **Accept Delegation Request** page is displayed with a confirmation message
- 6 Click the **Ok** button.
- 7 The **My Delegated Authorities** page displays.

Delegating Another Employee's Worklist



My Delegated Authorities

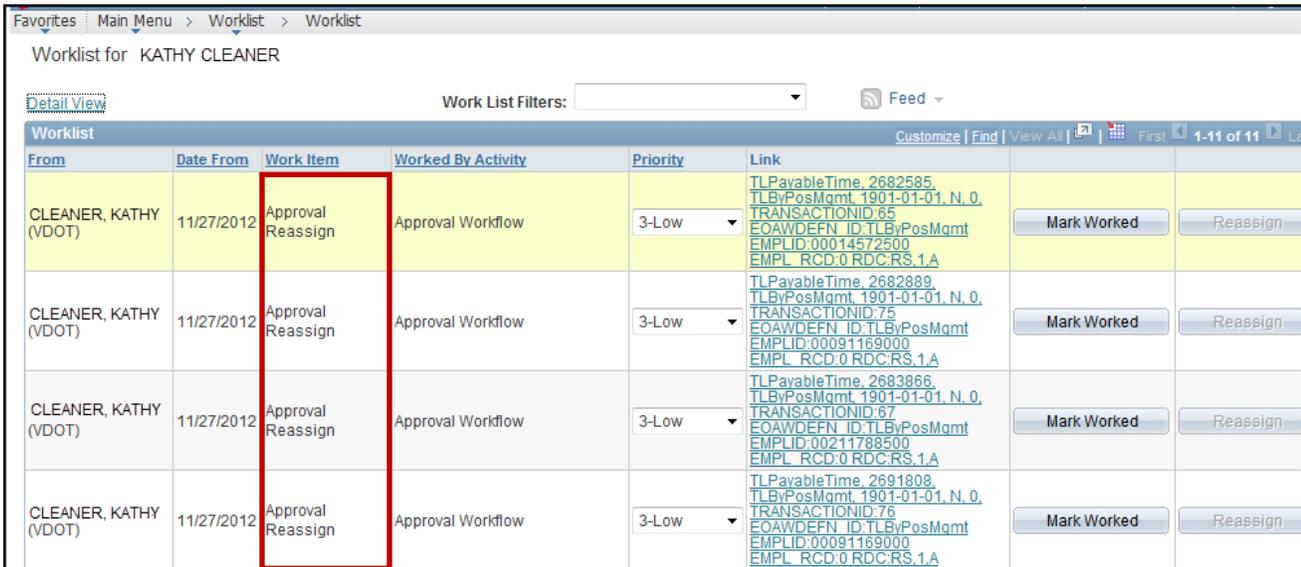
KATHY CLEANER
Fin Svcs Mgr I

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:

[Select All](#) [Deselect All](#)
[Return to Manage Delegation](#)

8 Click the **Worklist** link.



Worklist for KATHY CLEANER

Work List Filters:

From	Date From	Work Item	Worked By Activity	Priority	Link		
CLEANER, KATHY (VDOT)	11/27/2012	Approval Reassign	Approval Workflow	3-Low	TL PayableTime: 2682585, TLByPosMgmt: 1901-01-01, N. 0, TRANSACTIONID:65, EOAWDEFN_ID:TLByPosMgmt, EMPLID:00014572500, EMPL_RCD:0 RDC:RS,1A	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>
CLEANER, KATHY (VDOT)	11/27/2012	Approval Reassign	Approval Workflow	3-Low	TL PayableTime: 2682889, TLByPosMgmt: 1901-01-01, N. 0, TRANSACTIONID:75, EOAWDEFN_ID:TLByPosMgmt, EMPLID:00091169000, EMPL_RCD:0 RDC:RS,1A	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>
CLEANER, KATHY (VDOT)	11/27/2012	Approval Reassign	Approval Workflow	3-Low	TL PayableTime: 2683866, TLByPosMgmt: 1901-01-01, N. 0, TRANSACTIONID:67, EOAWDEFN_ID:TLByPosMgmt, EMPLID:00211788500, EMPL_RCD:0 RDC:RS,1A	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>
CLEANER, KATHY (VDOT)	11/27/2012	Approval Reassign	Approval Workflow	3-Low	TL PayableTime: 2691808, TLByPosMgmt: 1901-01-01, N. 0, TRANSACTIONID:76, EOAWDEFN_ID:TLByPosMgmt, EMPLID:00091169000, EMPL_RCD:0 RDC:RS,1A	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>

- 9 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 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.