Delegation Administration for Supervisors Overview

This Job Aid provides step-by-step instructions for delegating and revoking your Worklist to another person (proxy). This allows the Proxy to approve or deny designated transactions on your behalf. It also includes how to accept and reject a Delegation Request as well as how to view Delegation Requests based on their current status.

Approval authority should only be delegated to a user:

- With a Cardinal TL Supervisor role in Cardinal HCM and has the same direct supervisor as you (Reports To) in Cardinal HCM

  OR

- The user is your direct supervisor (Reports To) in Cardinal HCM with the Cardinal TL Supervisor role

Delegation cannot be used when a Reports To position is vacant or when the Reports To supervisor is suspended or on Leave of Absence (paid leave, unpaid leave, LOA Working). In these scenarios, Cardinal will route approvals to the supervisor's Reports To supervisor.

Note: It is never recommended to delegate down to one of your direct report employees. If this is done, that employee will have the ability to approve their own time or absences as well as the time and absences for all of your other direct report employees. Self-approval of time and absences is strongly discouraged and is not a best business practice. See the TA Delegation Example at the end of this Job Aid for examples of best business practice delegation.

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Delegating Your Worklist

The following steps are used to delegate your Worklist to a Proxy or will process approvals on your behalf.

Reminder: Delegation cannot be used when a Reports To position is vacant or when the Reports To supervisor is suspended or on Leave of Absence (paid leave, unpaid leave, LOA Working). In these scenarios, Cardinal will route approvals to the supervisor's Reports To supervisor.

1.   Navigate to the **Manage Delegation** page using the following path:

   Menu > Self-Service > Manage Delegation

The **Manage Delegation** page displays.

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

2.   Click the **Create Delegation Request** link.

The **Create Delegation Request** page displays. The **Enter Dates** section is displayed by default.

Create Delegation Request

Enter Dates

Environmental Manager II

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date	11/02/2022
To Date	11/18/2022

[Next]   [Cancel]

3. Enter or select the applicable from and to dates for the period of time you need the person to act as a proxy on your behalf in the **From Date** and **To Date** fields respectively.

   Note: For an open-ended Delegation Request, do not enter a date in the **To Date** field.

4. Click the **Next** button.

The **Create Delegation Request** page refreshes with the **Select Transactions** section.

Create Delegation Request

Select Transactions

Environmental Manager II

Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions

	Transaction	
☑	Manage Approve Payable Time	
☑	Manage Approve Reported Time	
☑	Manage Reported Time	
☑	Manager Absence Balance Fluid	
☑	Manager Absence History Fluid	

Select All   Deselect All

Previous	Next	Cancel

5.   Click the **Select All** link.

   Note: When creating Delegation Requests, you should always select all of the Transaction Types.

6.   Click the **Next** button.

The **Create Delegation Request** page refreshes with the **Select Proxy by Hierarchy** section.

Create Delegation Request							
Select Proxy by Hierarchy							
Environmental Manager II							

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the *Search by Name* hyperlink to search for proxies outside your hierarchy.

Choose Delegate

	Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name	
○			Employee	Environmental Manager I	Dairy and Foods		
○			Employee	Admin and Office Spec III	Dairy and Foods		
○			Employee	Compliance/Safety Officer IV	Dairy and Foods		
◉			Employee	Environmental Manager I	Dairy and Foods		
○			Employee	Environmental Manager II	Meat and Poultry Services		
○			Employee	Gen Admin Manager II	Animal and Food Ind Srv Admin		
○			Employee	Veterinarian II	Veterinary Services		
○			Employee	Environmental Manager I	Dairy and Foods		
○			Employee	Gen Admin Supv I/Coord I	Animal and Food Ind Srv Admin		

Previous	Next	Cancel

7. All eligible employees display for selection. Select the applicable proxy by clicking the corresponding **Select** radio button option.

    Note: It is never recommended to delegate down to one of your direct report employees. If this is done, that employee will have the ability to approve their own time or absences as well as the time and absences for all of your other direct report employees. Self-approval of time and absences is strongly discouraged and is not a best business practice. See the TA Delegation Example at the end of this Job Aid for examples of best business practice delegation.

8. Click the **Next** button.

The **Create Delegation Request** page refreshes with the **Delegation Detail** section.

Create Delegation Request

Delegation Detail

Environmental Manager II

Proxy	
From Date	11/02/2022
To Date	11/18/2022

Transactions

Manage Approve Payable Time	
Manage Approve Reported Time	
Manage Reported Time	
Manager Absence Balance Fluid	
Manager Absence History Fluid	

[**Submit**] [**Previous**] [**Cancel**]

9.   Review the information, and if accurate, click the **Submit** button to complete the Delegation Request.

Note: Use the **Previous** button to return to the previous sections and make updates as needed.

A **Confirmation** message displays indicating that you have successfully submitted your Delegation Request.

Create Delegation Request

Environmental Manager II

You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

[**OK**]

10.   Click the **OK** button.

Revoking Your Worklist

The following steps are used to revoke (take back) your Worklist.

Note: Delegations will automatically expire on the **To Date** selected. Revoking is only necessary if you want to take back your Worklist prior to the defined to date.

1. Navigate to the **Manage Delegation** page using the following path:

   Menu > Self Service > Manage Delegation

The **Manage Delegation** page displays.

2. Click the **Review My Proxies** link.

The **My Proxies** page displays.

3. Click the **Select All** link to select all of the Transaction Type(s) to revoke simultaneously.

4. Click the **Revoke** button.

The **Revoke Delegation Request** page displays.

5. Click the **Yes – Continue** button to confirm.

A **Confirmation** message displays indicating that you have successfully revoked your Delegation Request.

Revoke Delegation Request

Environmental Manager II

You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.

OK

6. Click the **OK** button.

Accepting or Rejecting a Delegation Request as a Proxy

The following steps are used to accept or reject a Delegation Request as the Proxy. When someone delegates transactions to you, you will receive an email notifying you of the delegation request.

Sample email:

1. Navigate to the **Manage Delegation** page using the follow path:

    Menu > Self-Service > Manage Delegation

    Note: If you are logged into Cardinal, you can also click the link in the email to access the **Manage Delegation** page.

The **Manage Delegation** page displays.

2.   Click the **Review My Delegated Authorities** link.

The **My Delegated Authorities** page displays.

3.   View the Delegation Request(s) that have been submitted to you. Click the **Multiple Transactions** link to see a detailed list of the Transaction Types being delegated to you.

The **Multiple Transactions** page displays in a pop-up window.

4.   Review the Transaction Types being delegated to you and then click the **Return** button.

The **My Delegated Authorities** page returns.

5. Click the **Select All** link.

   Note: To accept a Delegation Request, proceed to Step 5. To reject a Delegation Request, proceed to Step 7.

6. Click the **Accept** button.

The **Accept Delegation Request** page displays with a **Confirmation** message indicating that you have accepted the Delegation Request.

7. Click the **OK** button. The process for accepting a Delegation Request is complete.

My Delegated Authorities

Environmental Manager 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	
☑	Multiple Transactions	Cosmo Spacely	Environmental Manager II	11/02/2022	11/18/2022	Submitted	Inactive	ⓘ	

Select All   Deselect All   [**Accept**]   [**Reject**]

Return to Manage Delegation

8.   Click the **Reject** button.

The **Reject Delegation Request** page displays with a **Confirmation** message indicating that you have rejected the Delegation Request.

Reject Delegation Request

Environmental Manager I

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

[**OK**]

9.   Click the **OK** button. The process for rejecting a Delegation Request is complete.

Viewing the Status of Delegation Requests

Use these steps to view Delegation Requests based on their current status.

1. Navigate to the **Manage Delegation** page using the following path:

    Menu > Self-Service > Manage Delegation

The **Manage Delegation** page displays.

2. Click the **Review My Delegated Authorities** link.

The **My Delegated Authorities** page displays.

3. Select the applicable Request Status to view using the **Show Requests by Status** dropdown button. The Request Status options are:

    a. Accepted

    b. Ended

    c. Rejected

    d. Revoked

    e. Submitted

4. Click the **Refresh** button.

The **My Delegated Authorities** page refreshes with the search results.

5. Review the Delegation Requests that meet the selected Request Status.

6. To view the Delegation Request(s) with another Request Status, select the applicable Request Status using the **Show Requests by Status** dropdown button and then click the **Refresh** button.

The page refreshes with search results based on the selected Request Status.

My Delegated Authorities

Financial Services Manager 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   Accepted   [Refresh]

Choose Delegate

|	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	
☐	Manage Approve Reported Time		Financial Services Manager II	10/16/2020	10/16/2020	Accepted	Active	ⓘ	

Select All   Deselect All
Return to Manage Delegation

TA Delegation Example (Best Business Practice)

Lee can delegate to **Sid** (his direct supervisor), and to **Cheryl** (who reports to his same supervisor). Both have the required TL Supervisor role*.

Paul can delegate to Lee (his direct supervisor) who has the required TL Supervisor role*. Paul cannot delegate to Jill because she does not "Report To" Paul's supervisor Lee.

Karen can delegate to **Paul** (her direct supervisor) or to Bill (her co-worker that reports to her same supervisor, Paul). Both have the required TL Supervisor role*. Note, that while Bill does not serve as anyone's Cardinal Reports To position, he was given the TL Supervisor role* so he could assist with timesheet and absence approvals when Karen is out of the office.

Bill has no direct reports. As a result, he will not have approval notifications to delegate to anyone. But because he was given the T&L Supervisor role, he will have security to approve TA transactions delegated to him by Karen.
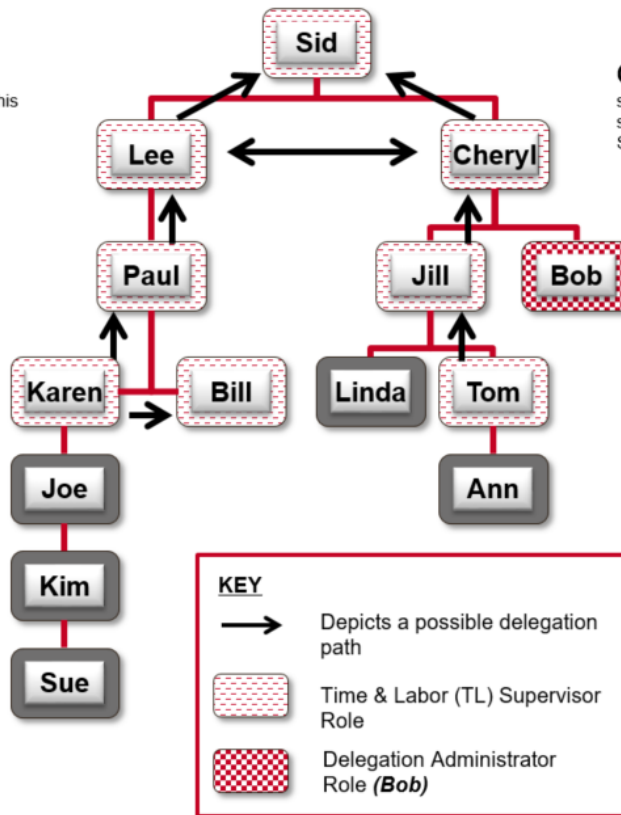
Cheryl can delegate to **Sid** (her direct supervisor), and to **Lee** (who reports to her same supervisor). Both have the required TL Supervisor role*.

Jill can delegate to **Cheryl** (her direct supervisor) who has the required TL Supervisor role*. Even though Bob reports to Jill's supervisor (Cheryl), she cannot delegate to him because he does not have the TL Supervisor role*.

Bob has no direct reports. As a result, he will not have approval notifications to delegate to anyone. But Bob does have the **Delegation Administrator** role which allows him to delegate approval notifications from any user to any other user with the TL Supervisor role* (e.g., when Sid is out, Bob could delegate Sid's approval notifications to Paul).

Tom can only delegate to **Jill** (his direct supervisor) who has the TL Supervisor role*. He cannot delegate to Linda because she does not have the TL Supervisor role*.

KEY

→ Depicts a possible delegation path

▦(red dotted) Time & Labor (TL) Supervisor Role

▦(checkered) Delegation Administrator Role *(Bob)*

*All users that are designated Reports To must be assigned the TL Supervisor role (and AM Supervisor if using Cardinal Absence Management)