



**Delegation Administration Overview**

Delegation Administrators are able to create, modify, and revoke Delegation Requests on behalf of TL Supervisors and Absence Management (AM) Supervisors (i.e., Approvers). This delegation functionality is used when the Approver has an unplanned absence and therefore, is unable to approve Timesheets/Absence requests and did not delegate them to another Approver prior to going out of office.

The Delegation Administrator can delegate to any agency TL Supervisor/AM Supervisor as a proxy. It is important to delegate all applicable transaction types to the proxy when assigning delegation. Delegation Administrators should follow agency guidelines regarding the delegation of approvals to ensure adequate internal controls are enforced.

Delegated transactions cannot be re-delegated by a TL Supervisor, AM Supervisor, or HR Administrator. Only a Delegation Administrator can re-delegate.

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 the supervisor's 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 that supervisor's 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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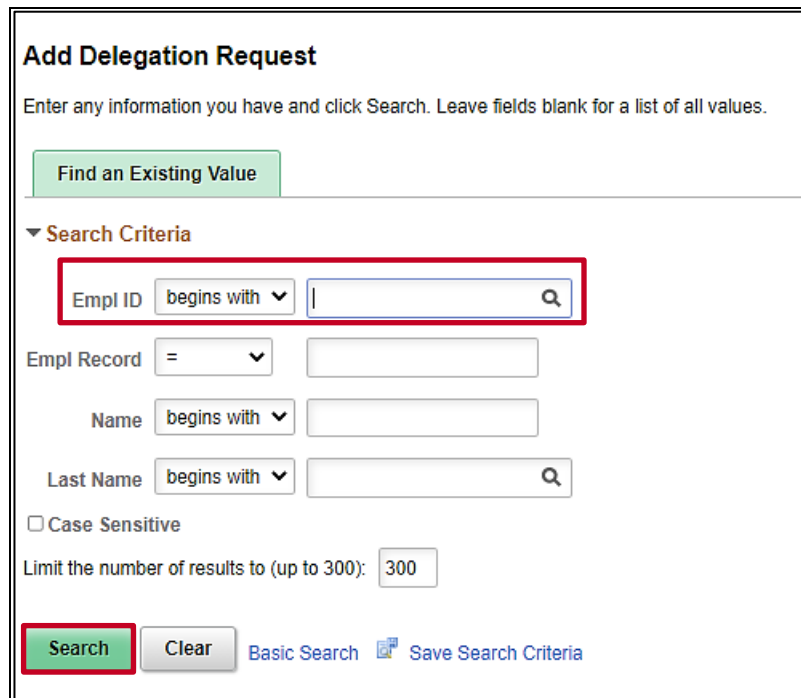
## Adding a Delegation Request

**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 **Add Delegation Request** page using the following path:

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

The **Add Delegation Request Search** page displays.



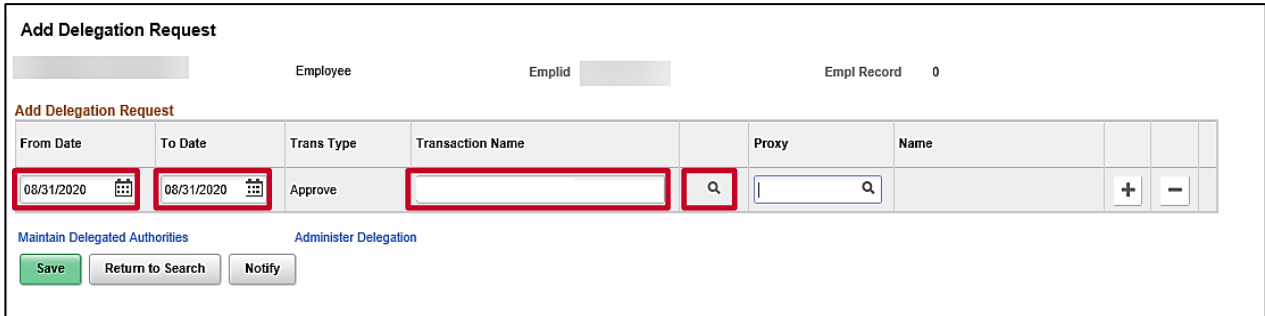
The screenshot shows the 'Add Delegation Request' search interface. At the top, there is a green button labeled 'Find an Existing Value'. Below this is a section titled 'Search Criteria' with a dropdown arrow. The first search criterion is 'Empl ID' with a 'begins with' dropdown and an input field containing a vertical bar. This entire row is highlighted with a red border. Below it are three more search criteria: 'Empl Record' with an '=' dropdown and an empty input field; 'Name' with a 'begins with' dropdown and an empty input field; and 'Last Name' with a 'begins with' dropdown and an empty input field. There is a 'Case Sensitive' checkbox which is unchecked. Below the search criteria is a text label 'Limit the number of results to (up to 300):' followed by an input field containing the number '300'. At the bottom, there is a green 'Search' button (highlighted with a red border), a grey 'Clear' button, and two blue links: 'Basic Search' and 'Save Search Criteria'.

2. Enter the Employee ID for the person you need to delegate on behalf of in the **Empl ID** field.

**Note:** When completing this field, enter the Supervisor's (person you are delegating the Worklist on behalf of) Employee ID.

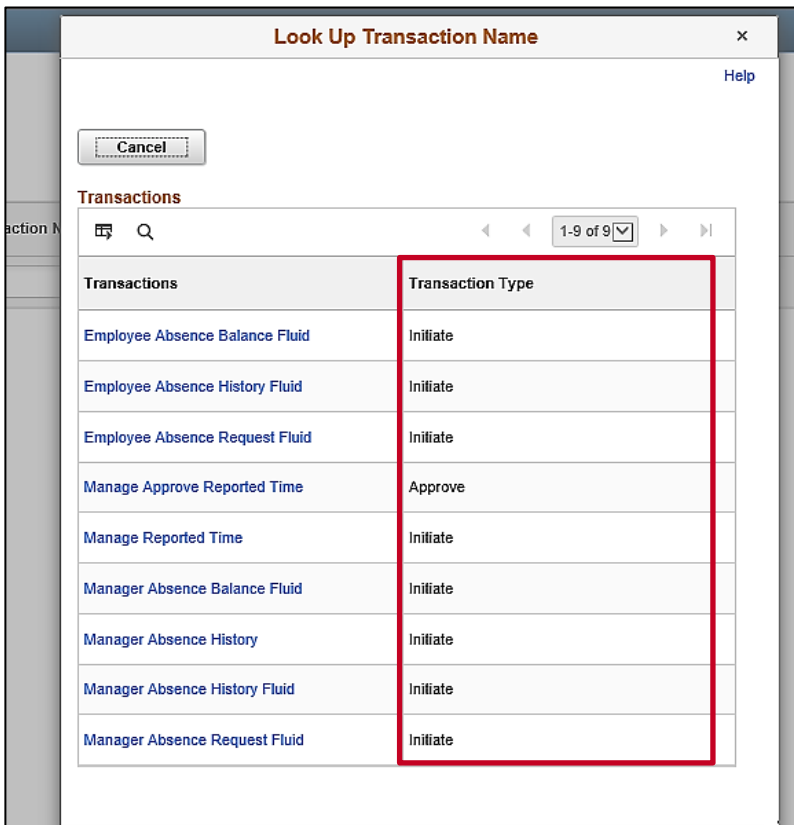
3. Click the **Search** button.

The **Add Delegation Request** page displays.



4. Enter/select the applicable from date for the request using the **From Date Calendar** icon. This is the date the delegation will begin.  
**Note:** If transactions need to be approved immediately, enter/select the current date. All pending items will be available for the proxy to approve once the proxy accepts the delegation.
5. Enter/select the applicable to date for the request using the **To Date Calendar** icon. This is the date the delegation will end; leave blank for ongoing delegation.
6. Click the **Transaction Name Look Up** icon.

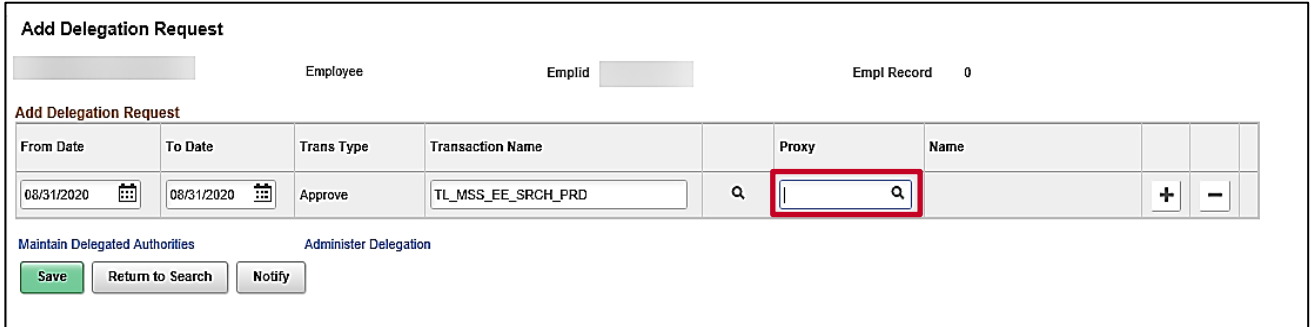
The **Look Up Transaction Name** page displays in a pop-up window.



Transactions	Transaction Type
Employee Absence Balance Fluid	Initiate
Employee Absence History Fluid	Initiate
Employee Absence Request Fluid	Initiate
Manage Approve Reported Time	Approve
Manage Reported Time	Initiate
Manager Absence Balance Fluid	Initiate
Manager Absence History	Initiate
Manager Absence History Fluid	Initiate
Manager Absence Request Fluid	Initiate

7. Select the applicable transaction type to delegate by clicking the corresponding link in the **Transactions** column.

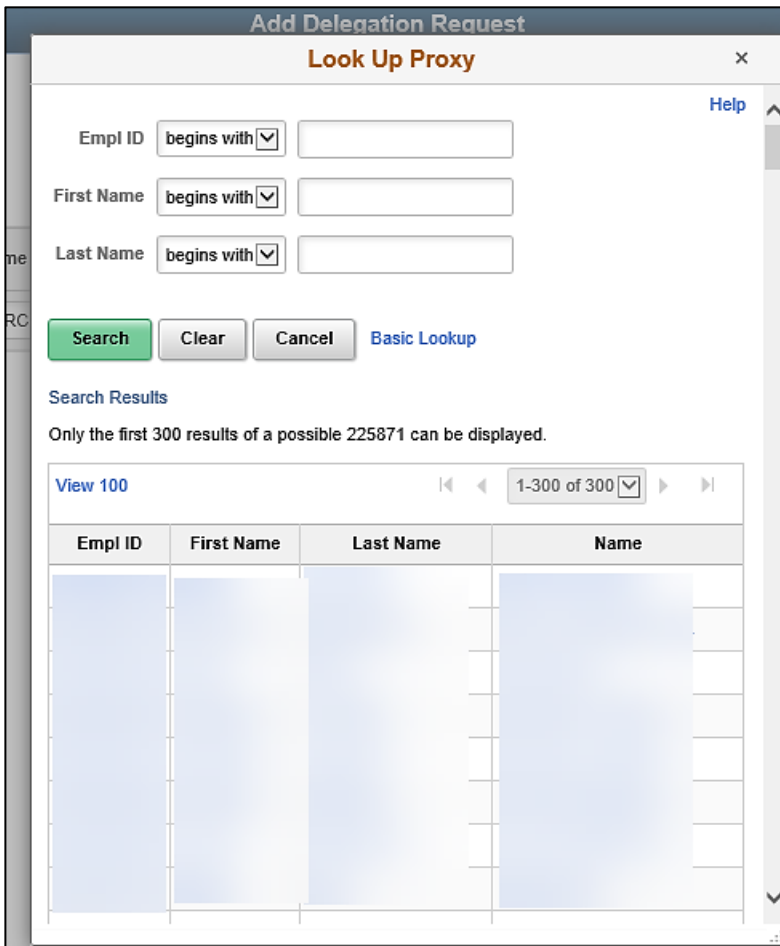
The **Add Delegation Request** page returns with the selected Transaction Name.



The screenshot shows the 'Add Delegation Request' interface. At the top, there are fields for 'Employee', 'Emplid', and 'Empl Record' (value: 0). Below this is a table with columns: 'From Date', 'To Date', 'Trans Type', 'Transaction Name', 'Proxy', and 'Name'. The 'From Date' is 08/31/2020 and 'To Date' is 08/31/2020. The 'Trans Type' is 'Approve' and the 'Transaction Name' is 'TL\_MSS\_EE\_SRCH\_PRD'. The 'Proxy' column contains a search icon and a text input field, which is highlighted with a red box. The 'Name' column contains a '+' and '-' icon. Below the table are links for 'Maintain Delegated Authorities' and 'Administer Delegation', and buttons for 'Save', 'Return to Search', and 'Notify'.

8. Click the **Proxy Look Up** icon.

The **Look Up Proxy** page displays in a pop-up window.



The screenshot shows a pop-up window titled 'Look Up Proxy'. It has a search form with fields for 'Empl ID', 'First Name', and 'Last Name', each with a 'begins with' dropdown menu. Below the form are 'Search', 'Clear', and 'Cancel' buttons, along with a 'Basic Lookup' link. A 'Search Results' section indicates that only the first 300 results of a possible 225871 can be displayed. A table below shows columns for 'Empl ID', 'First Name', 'Last Name', and 'Name', with a 'View 100' dropdown and a '1-300 of 300' dropdown.



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## TA372\_Delegation Administration

9. All employees for all agencies display in this list. Select or search for the applicable employee within the delegator's agency by Employee ID or name. The employee selected should either:
- Have the TL Supervisor role in Cardinal HCM and have the same direct supervisor as the delegator (Reports To) in Cardinal HCM
- or
- Be the direct supervisor of the person for whom you are delegating

**Note:** It is never recommended to delegate down to one of the supervisor's 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 that supervisor's 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.

The **Add Delegation Request** page returns with the selected Proxy.

The screenshot shows the 'Add Delegation Request' form. At the top, there are fields for Employee, Emplid, and Empl Record. Below this is a table with columns: From Date, To Date, Trans Type, Transaction Name, Proxy, and Name. The first row contains: 08/31/2020, 08/31/2020, Approve, TL\_MSS\_EE\_SRCH\_PRD, a search icon, and a search icon. A red box highlights a '+' icon in the rightmost column of the table. Below the table are buttons for 'Save', 'Return to Search', and 'Notify'.

10. To continue to add delegation items for additional transaction types, click the **Add a New Row** icon (+) and then repeat Steps 4 - 9 until all transaction types you want to include have been added (sample screenshot below).

The screenshot shows the 'Add Delegation Request' form with four rows of delegation items. Each row has columns for From Date, To Date, Trans Type, Transaction Name, Proxy, and Name. The rows are: 1) 09/01/2020 to 09/03/2020, Approve, TL\_SRCH\_APPRV\_GRP, search icon, search icon, and '+' icon. 2) 09/01/2020 to 09/03/2020, Approve, TL\_MSS\_EE\_SRCH\_PRD, search icon, search icon, and '+' icon. 3) 09/01/2020 to 09/03/2020, Initiate, TL\_MSS\_EE\_SRCH\_PRD, search icon, search icon, and '+' icon. 4) 09/01/2020 to 09/03/2020, Initiate, GP\_ABS\_MGRSS\_BAL, search icon, search icon, and '+' icon. A red box highlights the 'Save' button at the bottom left.

11. After all transaction types have been added, click the **Save** button.

**Note:** The delegation is not active until the proxy accepts it. The proxy can find instructions for accepting the delegation in the Job Aid titled **TA373\_Delegation Administration for Supervisors**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

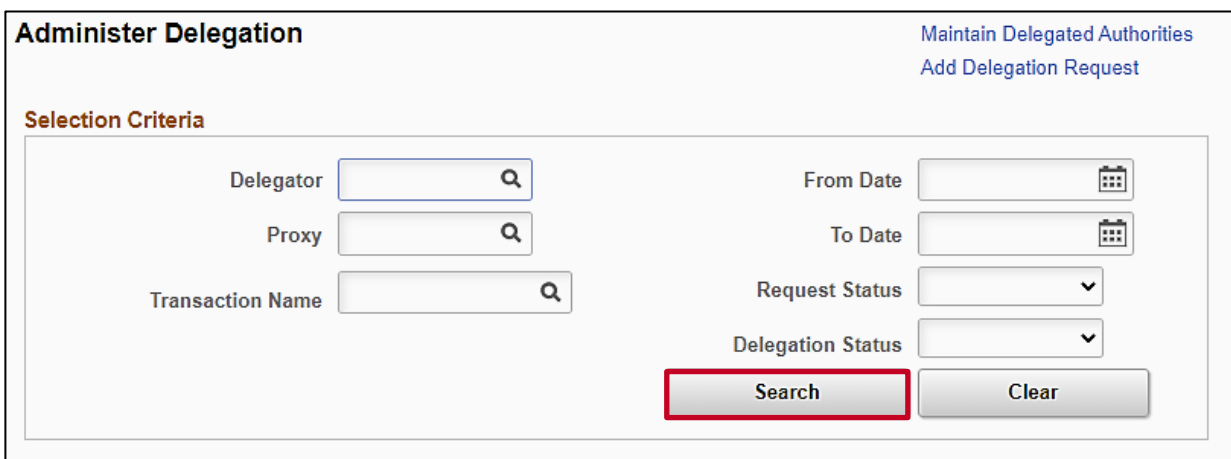
## Administering Delegation

The Delegation Administrator can see all delegation activities including delegations initiated by supervisors.

Use the **Administer Delegation** page to view, reassign, and revoke delegations, as well as view past delegations. The selection criteria allows various views.

1. To administer delegation, navigate to the **Administer Delegation** page using the following path:  
**Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Administer Delegation**

The **Administer Delegation** page displays.



The screenshot shows the "Administer Delegation" page. At the top right, there are two links: "Maintain Delegated Authorities" and "Add Delegation Request". Below these is the "Selection Criteria" section, which contains several search fields: "Delegator", "Proxy", and "Transaction Name" (each with a magnifying glass icon); "From Date" and "To Date" (each with a calendar icon); "Request Status" and "Delegation Status" (each with a dropdown arrow). At the bottom right of the search criteria section, there are two buttons: "Search" (highlighted with a red border) and "Clear".

2. Enter the applicable search criteria to search for a delegation (or group of delegations) using any of the search criteria fields. Below is a description of the search criteria fields:
  - a. **Delegator:** Enter/select the person for whom the TA transactions belong (Reports To).
  - b. **Proxy:** Enter/select the person for whom the TA transactions are delegated (assigned).
  - c. **Transaction Name:** Enter the type of TA transaction.
  - d. **From Date/To Date:** Use these fields to enter a date range.
  - e. **Request Status:** Select the current status of the Delegation Request(s). The statuses available for selection are "Accepted", "Ended", "Rejected", "Revoked", or "Submitted".
  - f. **Delegation Status:** Select the current status of the delegation(s). The statuses available for selection are "Active" or "Inactive".
3. Click the **Search** button.



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## TA372\_Delegation Administration

The **Search Results** display in the bottom portion of the page. The **Delegation Request** tab displays by default.

### Administer Delegation

[Maintain Delegated Authorities](#)  
[Add Delegation Request](#)

**Selection Criteria**

Delegator <input type="text"/>	From Date <input type="text" value="09/01/2020"/>
Proxy <input type="text"/>	To Date <input type="text" value="09/03/2020"/>
Transaction Name <input type="text"/>	Request Status <input type="text"/>
	Delegation Status <input type="text"/>

**Search Results**

	Description	Delegator	Name	Proxy	Name
<input type="checkbox"/>	Manager Absence Balance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Manage Approve Reported Time	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Manage Reported Time	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Manage Approve Payable Time	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Click the **Request Details** tab to review additional information for the Delegation Requests.

The **Request Details** tab displays.

**Administer Delegation**

[Maintain Delegated Authorities](#)  
[Add Delegation Request](#)

**Selection Criteria**

Delegator <input type="text"/>	From Date <input type="text" value="09/01/2020"/>
Proxy <input type="text"/>	To Date <input type="text" value="09/03/2020"/>
Transaction Name <input type="text"/>	Request Status <input type="text"/>
	Delegation Status <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>	

**Search Results**

	From Date	To Date	Request Status	Delegation Status	Notify Delegator
<input type="checkbox"/>	09/01/2020	09/03/2020	Submitted	Active	<input type="checkbox"/>
<input type="checkbox"/>	09/01/2020	09/03/2020	Submitted	Active	<input type="checkbox"/>
<input type="checkbox"/>	09/01/2020	09/03/2020	Submitted	Active	<input type="checkbox"/>
<input type="checkbox"/>	09/01/2020	09/03/2020	Submitted	Active	<input type="checkbox"/>

5. To revoke delegated items:

- a. Select the applicable Delegation Request(s) by clicking the corresponding **Select** checkbox option(s).

**Note:** The **Select All** button can be used to select all of the Delegation Requests simultaneously.

- b. Click the **Revoke** button.

**Note:** Delegations do not need to be revoked if an end date was populated and the delegation is not being removed prior to that date. The delegation will automatically expire on the end date and any remaining pending items will be returned to the Reports To Approver.

6. To reassign delegated items:

- a. Revoke the original delegated items by following Step 5 above.
- b. Add a new delegation by following the steps in the [Adding a Delegation Request](#) section of this Job Aid.



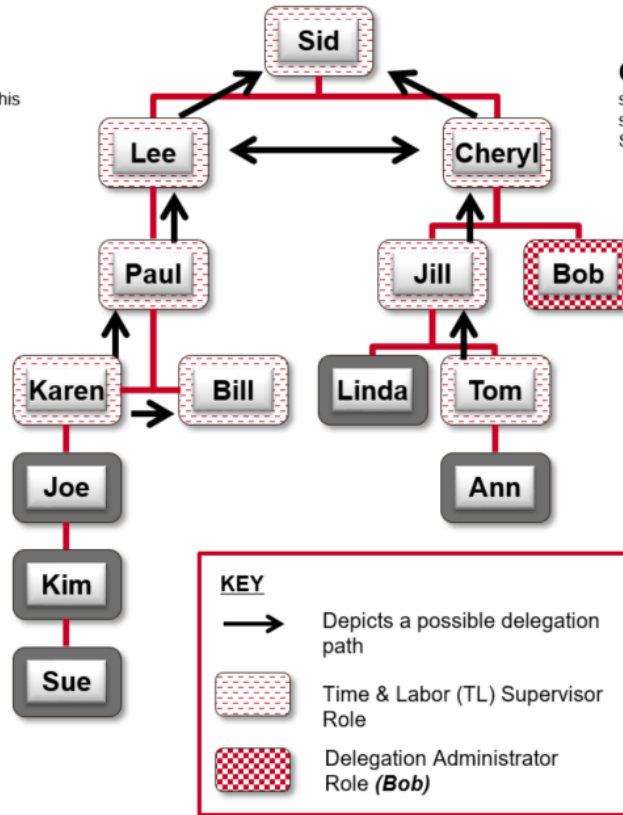
### TA Delegation Example (Best Business Practice)

**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\*.

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