

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.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

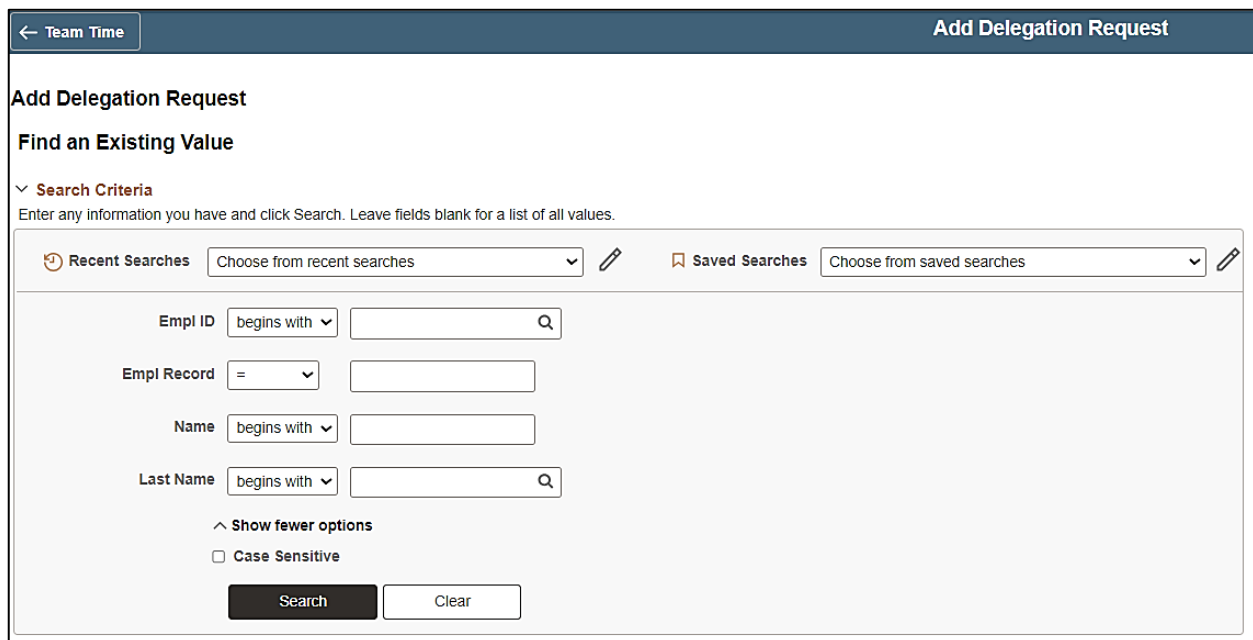
Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.


Adding a Delegation Request

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.

Step	Action
1.	Navigate to the Add Delegation Request page using the following path: NavBar > Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

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













	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
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2.	Enter the Employee ID for the person being delegated on behalf of in the Empl ID field. Note: When completing this field, enter the Supervisor's (person whose Worklist is being delegated on behalf of) Employee ID.
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3.	Click the Search button.
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Step	Action																
	<p>The Add Delegation Request page displays.</p> <div data-bbox="191 380 1446 690" style="border: 1px solid black; padding: 5px;"> <p>Add Delegation Request</p> <p>Employee _____ Emplid _____ Empl Record 0</p> <p>Add Delegation Request</p> <table border="1" data-bbox="201 495 1398 583"> <thead> <tr> <th>From Date</th> <th>To Date</th> <th>Trans Type</th> <th>Transaction Name</th> <th>Proxy</th> <th>Name</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>08/31/2020 </td> <td>08/31/2020 </td> <td>Approve</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p>Maintain Delegated Authorities Administer Delegation</p> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/></p> </div>	From Date	To Date	Trans Type	Transaction Name	Proxy	Name			08/31/2020 	08/31/2020 	Approve	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
From Date	To Date	Trans Type	Transaction Name	Proxy	Name												
08/31/2020 	08/31/2020 	Approve	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>										
4.	<p>Enter/select the applicable from date for the request using the From Date Calendar icon. This is the date the delegation will begin.</p> <div data-bbox="277 812 495 951" style="border: 1px solid gray; padding: 5px;"> <p>From Date</p> <p>08/31/2020 </p> </div>																
	<p>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.</p>																
5.	<p>Enter/select the applicable to date for the request using the To Date Calendar icon. This is the date the delegation will end. Leave the To Date field blank for ongoing delegation.</p> <div data-bbox="277 1182 479 1323" style="border: 1px solid gray; padding: 5px;"> <p>To Date</p> <p>08/31/2020 </p> </div>																
6.	<p>Click the Transaction Name Look Up icon.</p> <div data-bbox="277 1413 727 1528" style="border: 1px solid gray; padding: 5px;"> <p>Transaction Name</p> <p><input type="text"/> </p> </div>																

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

x
Help

Cancel

Transactions

🔍 1-9 of 9

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

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

Transactions	Transaction Type
Employee Absence Balance Fluid	Initiate

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

Add Delegation Request


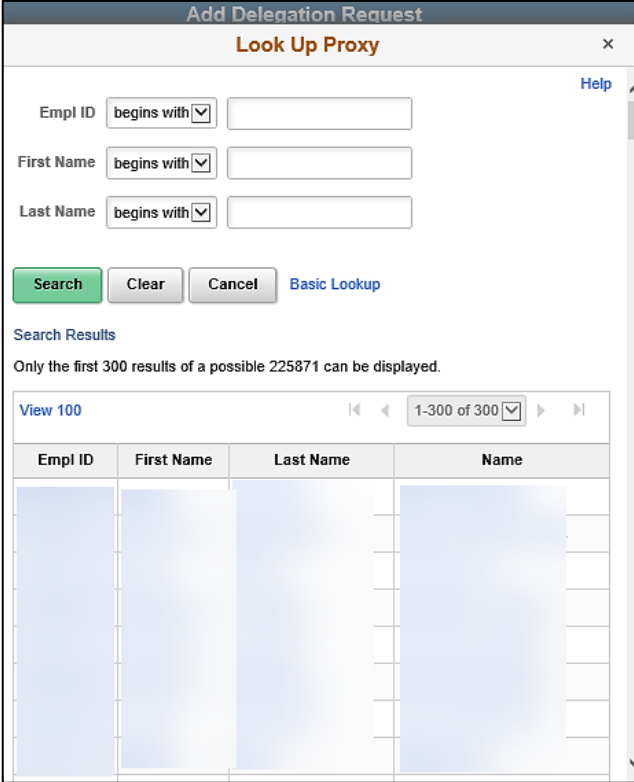

Employee Emplid Empl Record 0

Add Delegation Request


From Date	To Date	Trans Type	Transaction Name	Proxy	Name
08/31/2020 <input type="text"/>	08/31/2020 <input type="text"/>	Approve	<input type="text" value="TL_MSS_EE_SRCH_PRD"/>	<input type="text"/>	<input type="text"/>

Maintain Delegated Authorities Administer Delegation

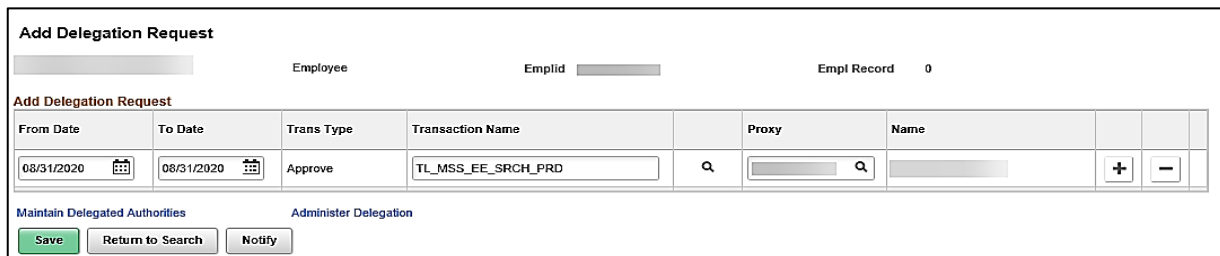
Save
Return to Search
Notify

Step	Action
8.	<p>Click the Proxy Look Up icon.</p> 
	<p>The Look Up Proxy page displays in a pop-up window. All employees for all Agencies display in this list.</p> 
9.	<p>Select or search for the applicable employee within the delegator's Agency by Employee ID or Name.</p> 

Step	Action
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	<p>The employee selected should either:</p> <ul style="list-style-type: none"> • Have the TL Supervisor role in Cardinal HCM and have the same direct supervisor as the delegator (Reports To) in Cardinal HCM <p>or</p> <ul style="list-style-type: none"> • Be the direct supervisor of the person being delegated for <p>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.</p>
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The **Add Delegation Request** page redisplay with the selected Proxy.



Add Delegation Request

Employee: [] Emplid: [] Empl Record: 0


From Date	To Date	Trans Type	Transaction Name	Proxy	Name		
08/31/2020	08/31/2020	Approve	TL_MSS_EE_SRCH_PRD	[]	[]	+	-

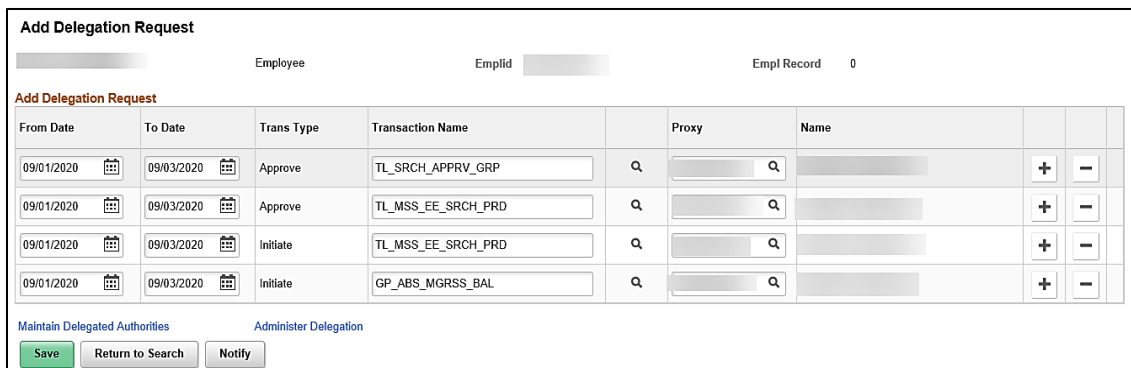
Maintain Delegated Authorities Administer Delegation

10.	<p>To continue to add delegation items for additional transaction types, click the Add a New Row icon (+).</p>
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Proxy	Name		
[]	[]	+	-

	<p>Repeat Steps 4 - 9 until all applicable transaction types have been added (sample screenshot below).</p>
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Add Delegation Request

Employee: [] Emplid: [] Empl Record: 0

From Date	To Date	Trans Type	Transaction Name	Proxy	Name		
09/01/2020	09/03/2020	Approve	TL_SRCH_APPRV_GRP	[]	[]	+	-
09/01/2020	09/03/2020	Approve	TL_MSS_EE_SRCH_PRD	[]	[]	+	-
09/01/2020	09/03/2020	Initiate	TL_MSS_EE_SRCH_PRD	[]	[]	+	-
09/01/2020	09/03/2020	Initiate	GP_ABS_MGRSS_BAL	[]	[]	+	-

Maintain Delegated Authorities Administer Delegation

Step	Action
11.	After all transaction types have been added, click the Save button. 
	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 allow various views.

Step	Action
1.	Navigate to the Administer Delegation page using the following path: NavBar > Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Administer Delegation

The **Administer Delegation** page displays.

Administer Delegation

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

Selection Criteria

Delegator

Proxy

Transaction Name

From Date

To Date

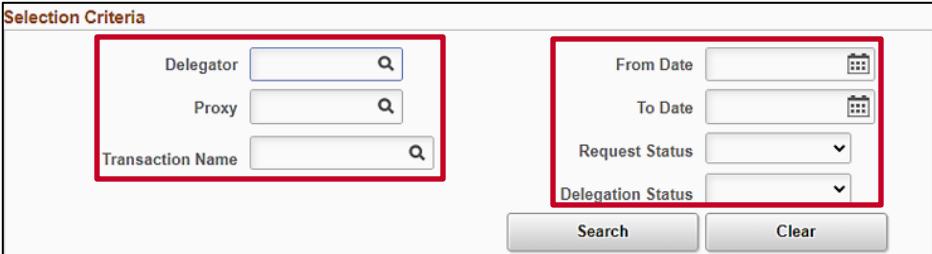

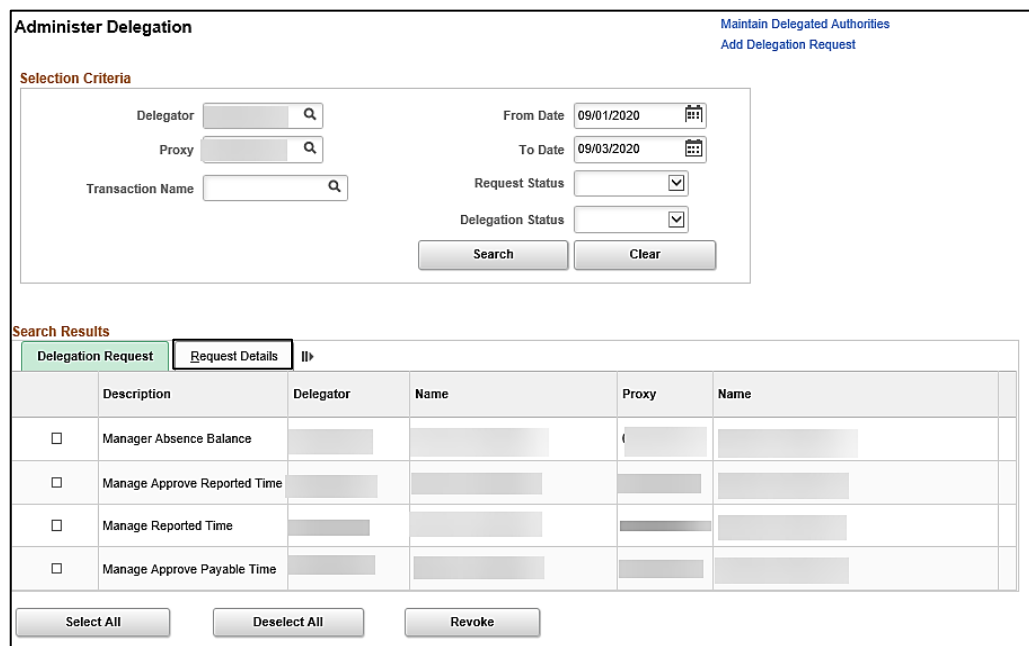

Request Status


Delegation Status




Below is a description of the search criteria fields:

- **Delegator:** Enter/select the person for whom the TA transactions belong (Reports To)
- **Proxy:** Enter/select the person to whom the TA transactions are delegated (assigned)
- **Transaction Name:** Enter the type of TA transaction
- **From Date/To Date:** Use these fields to enter a date range
- **Request Status:** Select the current status of the Delegation Request(s). The statuses available for selection are "Accepted", "Ended", "Rejected", "Revoked", or "Submitted"
- **Delegation Status:** Select the current status of the delegation(s). The statuses available for selection are "Active" or "Inactive"

Step	Action
2.	<p>Enter the applicable search criteria to search for a delegation (or group of delegations) using any of the search criteria fields.</p> 
3.	<p>Click the Search button.</p> 
<p>The search results display in the bottom portion of the page. The Delegation Request tab displays by default.</p> 	
4.	<p>Click the Request Details tab to review additional information for the Delegation Requests.</p> 

Step	Action																														
	<p>The Request Details tab displays.</p> <div data-bbox="295 378 1339 1033" style="border: 1px solid black; padding: 10px;"> <p>Administer Delegation Maintain Delegated Authorities Add Delegation Request </p> <p>Selection Criteria</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Delegator <input type="text" value=""/> <input type="button" value="Q"/></p> <p>Proxy <input type="text" value=""/> <input type="button" value="Q"/></p> <p>Transaction Name <input type="text" value=""/> <input type="button" value="Q"/></p> </div> <div style="width: 45%;"> <p>From Date <input type="text" value="09/01/2020"/> <input type="button" value="📅"/></p> <p>To Date <input type="text" value="09/03/2020"/> <input type="button" value="📅"/></p> <p>Request Status <input type="text" value=""/> <input type="button" value="▼"/></p> <p>Delegation Status <input type="text" value=""/> <input type="button" value="▼"/></p> <p style="text-align: center;"> <input type="button" value="Search"/> <input type="button" value="Clear"/> </p> </div> </div> <p>Search Results</p> <div style="display: flex; border-bottom: 1px solid gray; margin-bottom: 5px;"> Delegation Request Request Details ▶▶ </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #e0e0e0;"> <th style="width: 5%;"></th> <th style="width: 15%;">From Date</th> <th style="width: 15%;">To Date</th> <th style="width: 15%;">Request Status</th> <th style="width: 15%;">Delegation Status</th> <th style="width: 15%;">Notify Delegator</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> <td>09/03/2020</td> <td>Submitted</td> <td>Active</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> <td>09/03/2020</td> <td>Submitted</td> <td>Active</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> <td>09/03/2020</td> <td>Submitted</td> <td>Active</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> <td>09/03/2020</td> <td>Submitted</td> <td>Active</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 5px;"> <input type="button" value="Select All"/> <input type="button" value="Deselect All"/> <input type="button" value="Revoke"/> </p> </div>		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"/>
	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.	<p>To revoke delegated items, select the applicable Delegation Request(s) by clicking the corresponding Select checkbox option(s).</p> <div data-bbox="295 1150 592 1407" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #e0e0e0;"> <th style="width: 5%;"></th> <th style="width: 15%;">From Date</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> </tr> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> </tr> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> </tr> <tr> <td><input type="checkbox"/></td> <td>09/01/2020</td> </tr> </tbody> </table> </div>		From Date	<input type="checkbox"/>	09/01/2020	<input type="checkbox"/>	09/01/2020	<input type="checkbox"/>	09/01/2020	<input type="checkbox"/>	09/01/2020																				
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<input type="checkbox"/>	09/01/2020																														
	<p>The Select All button can be used to select all of the Delegation Requests simultaneously.</p> <div data-bbox="295 1501 527 1564" style="border: 1px solid gray; padding: 5px; margin: 10px 0; text-align: center;"> <input type="button" value="Select All"/> </div>																														
6.	<p>Click the Revoke button.</p> <div data-bbox="295 1648 760 1711" style="border: 1px solid gray; padding: 5px; margin: 10px 0; text-align: center;"> <input type="button" value="Deselect All"/> <input style="margin-left: 20px;" type="button" value="Revoke"/> </div>																														

Step	Action
	<p>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.</p> <p>To reassign delegated items:</p> <p>Revoke the original delegated items by following Step 5 above.</p> <p>Add a new delegation by following the steps in the Adding a Delegation Request section of this Job Aid.</p>

TA Delegation Example (Best Business Practice)

