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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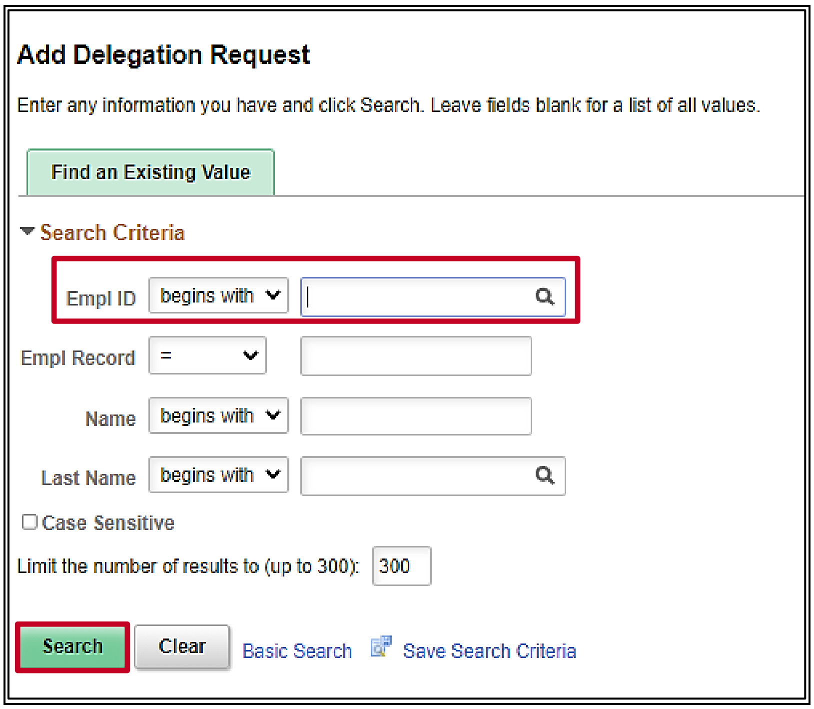
Adding a Delegation Request

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.

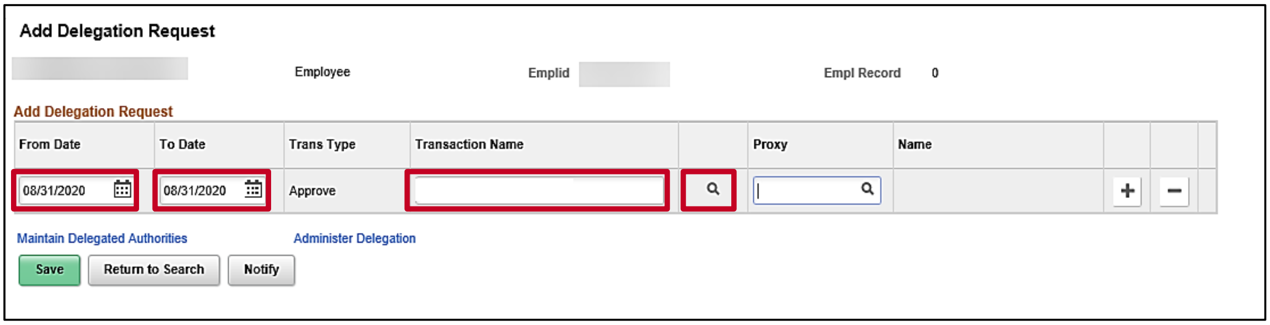


2. Enter the Employee ID for the person you need to delegate on behalf of in the **Empl ID** field.

   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.



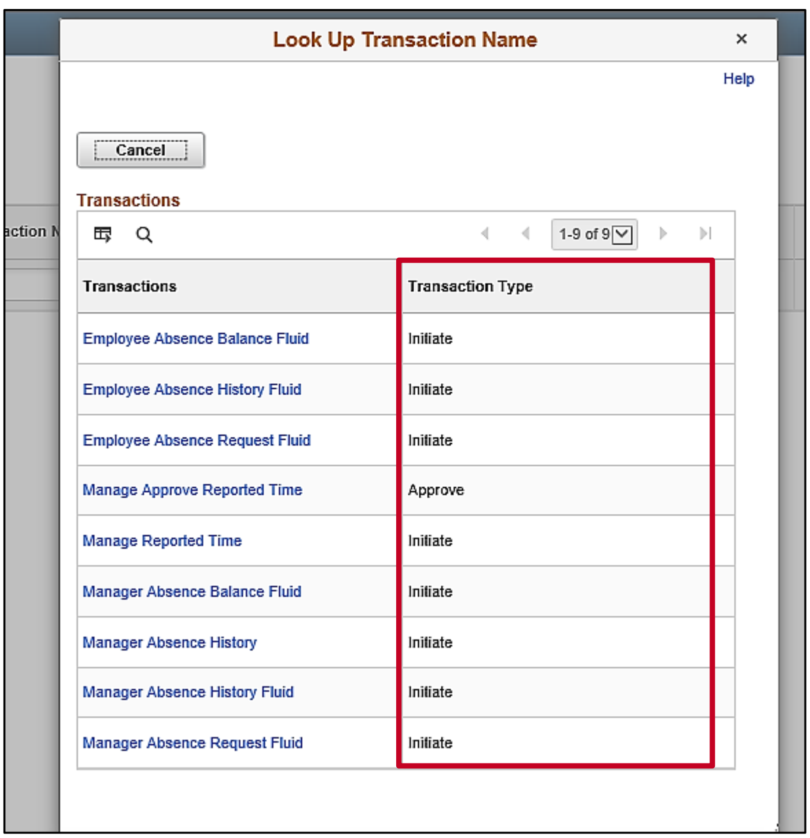
4. Enter/select the applicable from date for the request using the **From Date Calendar** icon. This is the date the delegation will begin.

   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.

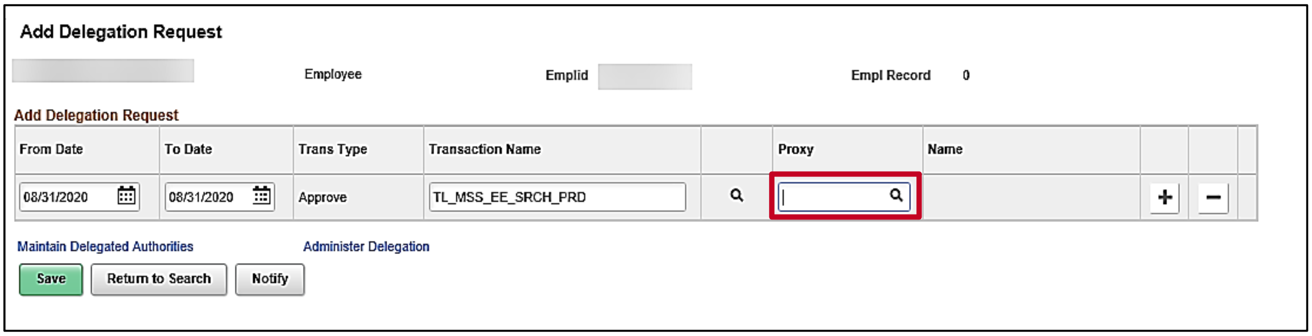
6. Click the **Transaction Name Look Up** icon.

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



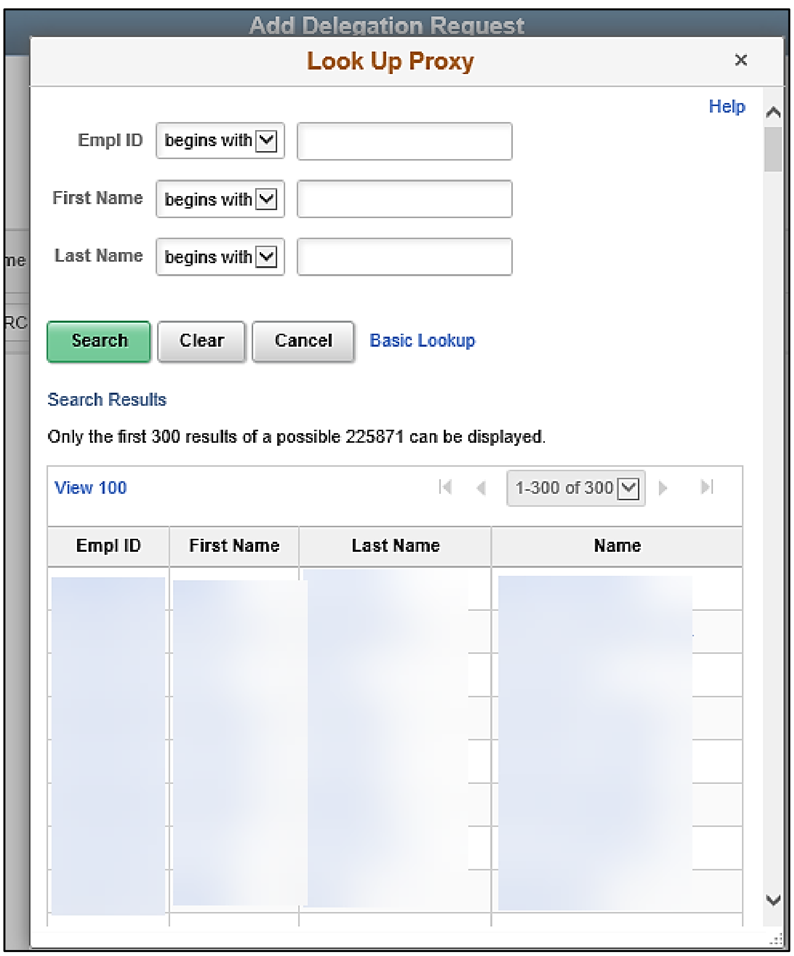
7. Select the applicable transaction type to delegate by clicking the corresponding link in the **Transactions** column.

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



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

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



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:

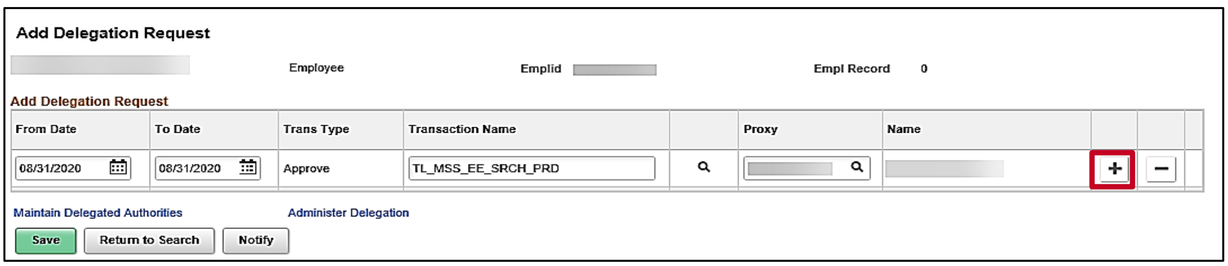
- Have the TL Supervisor role in Cardinal HCM and have the same direct supervisor as the delegator (Reports To) in Cardinal HCM

  or

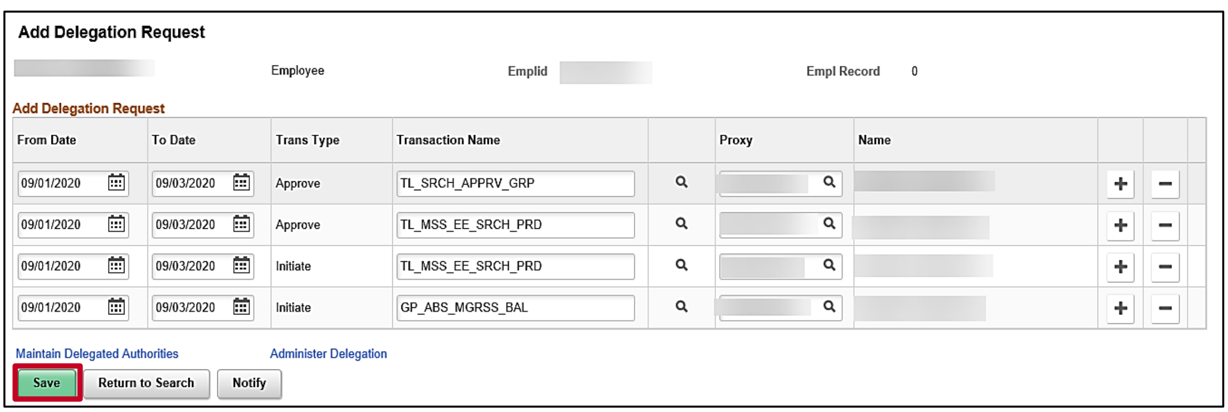
- Be the direct supervisor of the person for whom you are delegating

  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.



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).



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

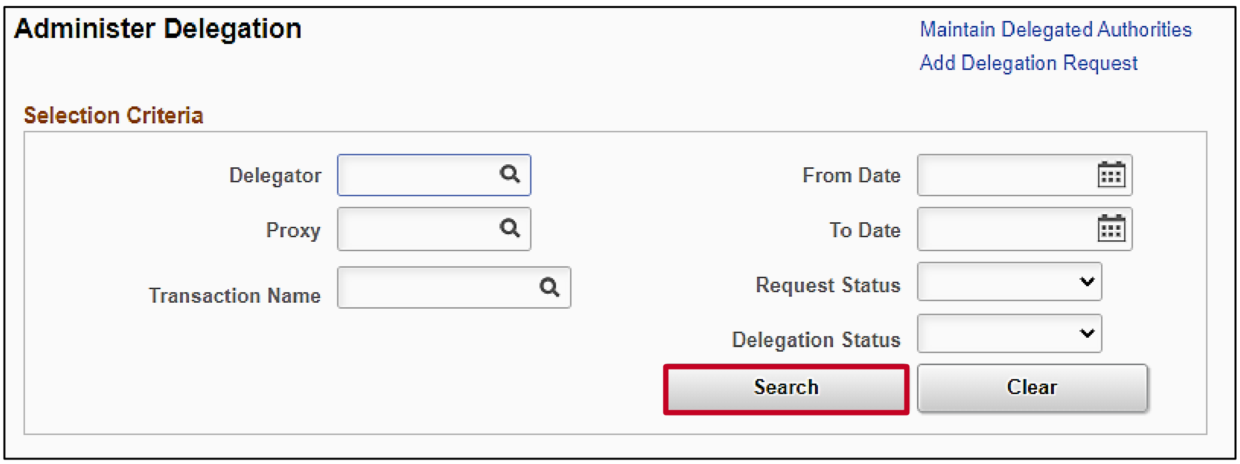
The Delegation Administrator can see all delegation activities including delegations initiated by supervisors.

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:

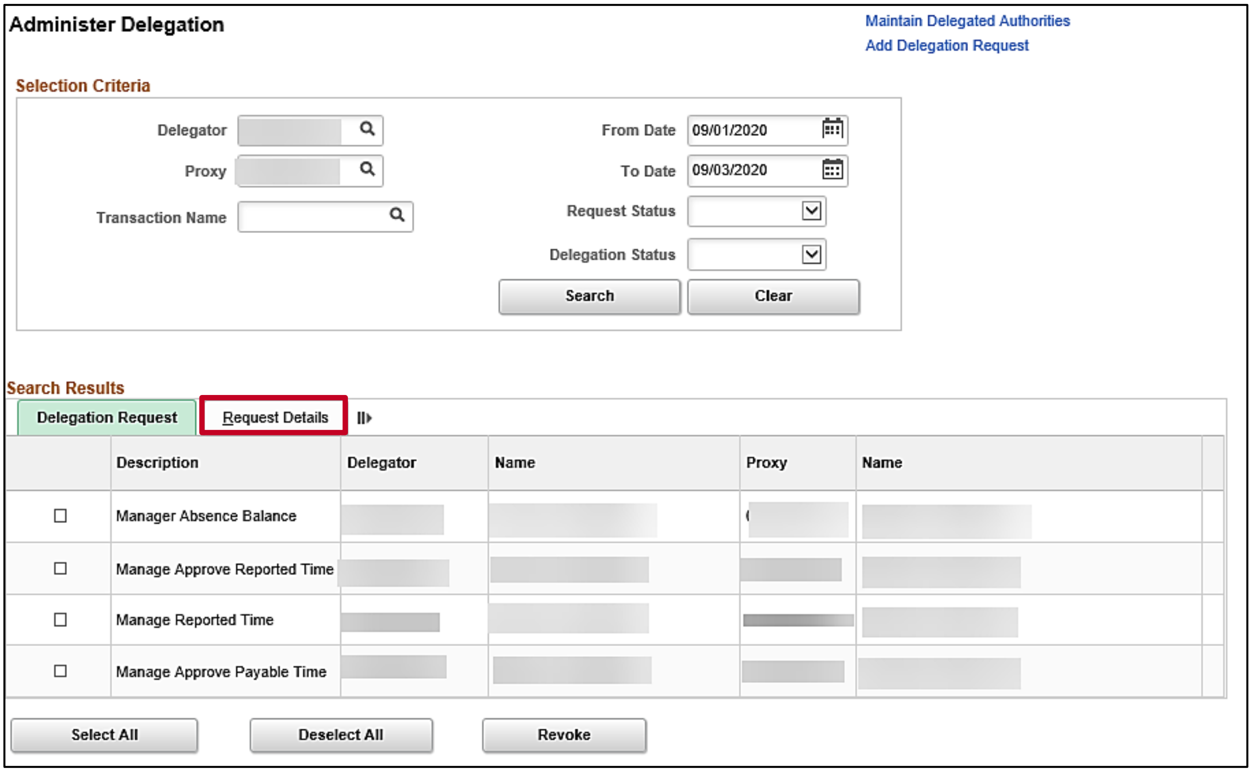
   Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Administer Delegation

The **Administer Delegation** page displays.



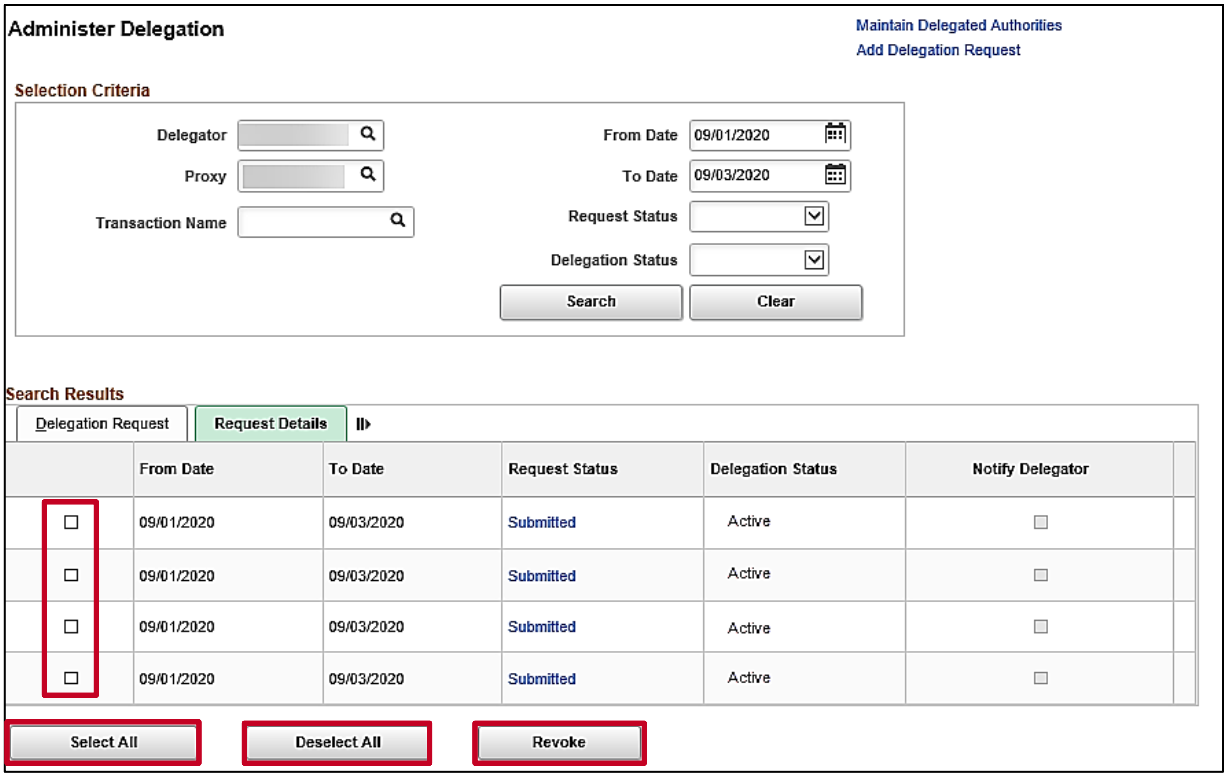
2. Enter the applicable search criteria to search for a delegation (or group of delegations) using any of the search criteria fields. Below is a description of the search criteria fields:
   a. **Delegator**: Enter/select the person for whom the TA transactions belong (Reports To).
   b. **Proxy**: Enter/select 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.

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



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

The **Request Details** tab displays.



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.

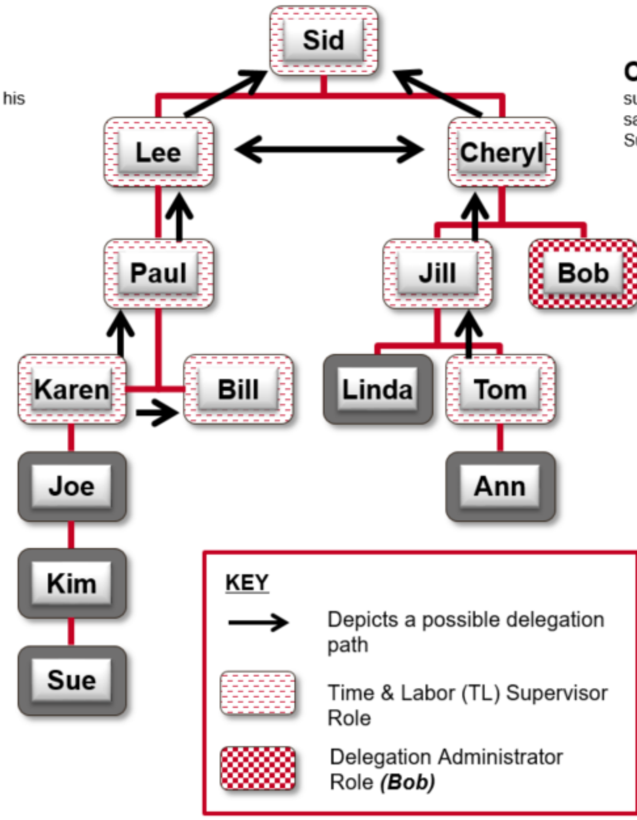
TA Delegation Example (Best Business Practice)

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)