

TA373_Delegation Administration for Supervisors

Delegation Administration for Supervisors Overview

This Job Aid provides step-by-step instructions for delegating and revoking the Worklist to another person (proxy). This allows the Proxy to approve or deny designated transactions on their 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 the (Reports To) in Cardinal HCM

OR

The user is the 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 the 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 the other direct report employees. Self-approval of time and absences is strongly discouraged and is not a best business practice. See the <u>TA Delegation Example</u> 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.



TA373_Delegation Administration for Supervisors

Table of Contents

Revision History	3
Delegating The Worklist	4
Revoking The Worklist	9
Accepting or Rejecting a Delegation Request as a Proxy	12
Viewing the Status of Delegation Requests	16
TA Delegation Example (Best Business Practice)	19



TA373_Delegation Administration for Supervisors

Revision History

Revision Date	Summary of Changes
12/3/2024	Baseline



TA373_Delegation Administration for Supervisors

Delegating The Worklist

The following steps are used by a supervisor to delegate their Worklist to a Proxy who will process approvals on their behalf.

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 Manage Delegation page using the following path:
	Menu > Self-Service > Manage Delegation
The Mana	age Delegation page displays.
N S a tt	Ianage Delegation
	Learn More about Delegation
Se	elect 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. Create Delegation Request



Step	Action							
The Create Delegation Request page displays. The Enter Dates section is displayed by default.								
(Create Delegation Request							
1	Enter Dates							
	Environmental Manager II							
E	Enter the dates for your delegation request. Enter a <i>From Date</i> that is today or later. Enter a <i>To Date</i> that is the ame as or later than your <i>From Date</i> . For open-ended delegation requests, leave the <i>To Date</i> blank.							
	Delegation Dates							
	From Date 11/02/2022							
	To Date 11/18/2022							
	Next Cancel							
3.	Enter the applicable from and to dates for the period of time needed for the person to act as a proxy on their behalf in the From Date and To Date fields.							
	From Date 11/02/2022 .							
	To Date 11/18/2022							
i	For an open-ended Delegation Request, do not enter a date in the To Date field.							
4.	Click the Next button.							
	Next Cancel							



Step	Action								
The Creat	reate 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.								
	Delegat	e 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 Se	lect All link.							
	Select All Deselect All								
1	When creating Delegation Requests, always select all of the Transaction Types.								
6.	Click the Ne	xt button.							
	Prev	Previous Next Cancel							



Step	Action										
The Creat eligible en	te Delegation	Request p ay for selec	age refre	shes with the S	elect Proxy	by Hierarch	y section. All				
	Create Delegation Request										
	Select Proxy by Hierard	:hy									
	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					
	0	1	Employee	Environmental Manager I	Dairy and Foods	Cosmo Spacely					
	0		Employee	Admin and Office Spec III	Dairy and Foods	Cosmo Spacely					
	0		Employee	Compliance/Safety Officer IV	Dairy and Foods	Cosmo Spacely					
		1	Employee	Environmental Manager I	Dairy and Foods	Cosmo Spacely					
	0		Employee	Environmental Manager II	Meat and Poultry Services	Janice Hunt004					
	0	(Employee	Gen Admin Manager II	Animal and Food Ind Srv Admin	Green Tree06					
	0		Employee	Veterinarian II	Veterinary Services	Janice Hunt004					
	0		Employee	Environmental Manager I	Dairy and Foods	Cosmo Spacely					
	•	I	Employee	Gen Admin Supv I/Coord I	Animal and Food Ind Srv Admin	Janice Hunt004					
	Previous	Next	Cancel								
7.	Select the ap	olicable pr	oxy by cli	cking the corres	sponding Sel	ect radio but	tton option.				
		•									
				Employee	Environmental	Manager I	Dairy and Foods				
i	It is never rec done, that em the time and a absences is s <u>Delegation Ex</u> delegation.	ommende ployee wil absences f trongly dis <u>cample</u> at f	d to deleg I have the or all of th couraged he end of	gate down to on ability to appro he other direct i and is not a be f this Job Aid fo	e of the direct ove their own report employ est business p r examples o	et report emp time or abse vees. Self-ap practice. Se f best busine	ployees. If this is ences as well as pproval of time and the the <u>TA</u> ess practice				
8.	Click the Nex	t button.									
	Previou	IS		Next	Cancel						



Step	Action
The Crea	e 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 Huid
	Submit Previous Cancel
0	Device the information and if accurate aligh the Culture hutten to complete the Delegation
9.	Request.
	Submit Previous Cancel
	Submit Previous Cancer
İ	Use the Previous button to return to the previous sections and make updates as needed.
A Confirm	ation message displays indicating that the Delegation Request has been submitted.
	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
	ок
10.	Click the OK button.
	ок



Revoking The Worklist

Delegations will automatically expire on the To Date defined (when applicable). Revoking the Worklist is only necessary if the user wants to take back their Worklist prior to the defined To Date or if a To Date was not defined.

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

Step	Action
1.	Navigate to the Manage Delegation page using the following path:
	Menu > Self Service > Manage Delegation

The Manage Delegation page displays.

Some of your se approve transac their transaction	elf-service transactions can be delegated so that others may act on your behalf to initiate and/or ctions for you and/or your employees. In addition, others may have delegated responsibility for is to you.			
	Learn More about Delegation			
Select Create De	elegation 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				
ransaction.	Review My Proxies			



Step	Action								
The My Proxies page displays.									
My Proxies									
Environmental Manager II This page allows you to view your proxies and the request status for each delegation request. Select a particular table page allows you to view your proxies and the request status for each delegation request. Select a particular									
revok	e requests, select the request,	then select Revoke.	Refresh		,				
Choo	Snow Requests by Status Refresh Choose Delegate								
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	
	Manager Absence Balance Fluid		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	0	
	Manager Absence History Fluid		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	0	
	Manage Reported Time		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	0	
	Manage Approve Reported Time		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	0	
	Manage Approve Payable Time		Environmental Manager I	11/02/2022	11/18/2022	Accepted	Active	0	
Select	All Deselect All		Revoke						
Return	to Manage Delegation		L						
	Click the Se		to coloct all of	the Tre	noodia		(a) to ray a		
З.				the Ha	insactio	птуре	(S) to revo	ke simuli	aneousiy.
	Select All	Deselect All							
			_						
4.	Click the Re	voke button							
	Revok	e							
The Revo	ke Delegatio	n Request	page displays.						
	Boyoko	Delegation	Poqueet						
	Revoke	Delegation	Request						
	Environme	ental Manager I							
	Are you s	ure you want to i	evoke the delegatio	n requests	that you h	ave selec	ted ?		
	Yes	Continue	No - Cano	cel					
5.	Click the Ye	s – Continu	e button to co	nfirm.					
	Yes - Co	ontinue	No - Can	cel					



Step	Action
A Confirn revoked.	nation message displays indicating that the Delegation Request has been successfully
	Revoke Delegation Request
	Environmental Manager II
	You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.
	οκ
6.	Click the OK button.
	ок



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 another user, they will receive an email notifying the user of the delegation request.

Sample email:

A delegation review and	on request f l acceptance	rom e Inbox X	has been submitted fo	r ē	Ø
		<u>via</u> vdot.virginia.govzzz	7:45 AM (17 minutes ago) 🍸	5	:
to	, me, :	Ŧ			
	or an administr	ator on behalf of	has submitted a delegation request to yo	u. Here a	re
the details:					
Transaction(s): T	MSS_EE_SRCH_	PRD			
From: 2020-10-16					
To: 2020-10-16					
System to notify		of each request:			
You can review th https://hrpytrn.car Page=HCDL_MG TRANSACTION_I	e request, then acce dinal.virginia.gov/psp R_DLGT&Action=U8 NAME=TL_MSS_EE	pt or reject the request, using the link l /hrpytrn/EMPLOYEE/HRMS/c/HCDL_ DELEGATOR_ID=00260870400&DEI _SRCH_PRD&TRANS_ALLOWED=A	below. ALL.HCDL_MGR_DLG_HOME.GBL? LEGATOR_RCD=0& &FROM_DATE=2020-10-16		



The Manage Delegation page displays.

ne of your self-service transactions can be deleg rove transactions for you and/or your employees r transactions to you.	jated so that others may act on your behalf to initiate and/or s. In addition, others may have delegated responsibility for
	Learn More about Delegation
ct Create Delegation Request to choose transac	tions to delegate and proxies to act on your behalf.
	Create Delegation Request
ct Review My Delegated Authorities to see the list of accept or reject pending delegation requests.	st of transactions that have been delegated to you by others,
	Review My Delegated Authorities



Step	Action
2.	Click the Review My Delegated Authorities link.
	Review My Delegated Authorities

The My Delegated Authorities page displays.

Environ	imental Manager I								
This pa	ge allows you to view your d	elegated authorities. Selec	ct a particular status and select Ref	resh to show the					
matchir	ig requests. Select the inforr	nation icon for request deta	ans.						
	Show Designed by Status Colonities								
	show requests by status Suprimited V Reiresn								
	Show Requests by S	tatus Submitted	 Refresh 						
Choose	Delegate	tatus Submitted	 Refresh 						
Choose	Delegate	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	
hoose	a Delegate Transaction Multiple Transactions	Name	Job Title	From Date 11/02/2022	To Date 11/18/2022	Request Status Submitted	Delegation Status Inactive	Details	

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



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

Multiple Transactions									
				Help					
Name	From Date	To Date	Request Status	Delegation Status					
	11/02/2022	11/18/2022	Submitted	Inactive					
	11/02/2022	11/18/2022	Submitted	Inactive					
	11/02/2022	11/18/2022	Submitted	Inactive					
	11/02/2022	11/18/2022	Submitted	Inactive					
	11/02/2022	11/18/2022	Submitted	Inactive					
	Name	Name From Date 11/02/2022 11/02/2022 11/02/2022 11/02/2022 11/02/2022 11/02/2022 11/02/2022 11/02/2022	Name From Date To Date 11/02/2022 11/18/2022 11/02/2022 11/18/2022 11/02/2022 11/18/2022 11/02/2022 11/18/2022 11/02/2022 11/18/2022 11/02/2022 11/18/2022 11/02/2022 11/18/2022	Name From Date To Date Request Status 11/02/2022 11/18/2022 Submitted 11/02/2022 11/18/2022 Submitted 11/02/2022 11/18/2022 Submitted 11/02/2022 11/18/2022 Submitted 11/02/2022 11/18/2022 Submitted					



Step	Action								
4.	Review the Tr	ansaction Ty	/pes being de	elegated	d to the	user and	then clic	k the Return b	utton.
The My I	Delegated Auth	orities page	e returns.						
My I	Delegated Authorities]
Envir This mate	ronmental Manager I page allows you to view your deleg hing requests. Select the informati Show Requests by Statu pse Delegate	pated authorities. Select a p on icon for request details. Is Submitted V	articular status and select <i>Ref</i>	resh to show the					
	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	0	
Retur	t All Deselect All n to Manage Delegation To accept a D proceed to Ste	elegation Rep 8.	Reject	ed to S	tep 5.	To reject	a Delega	tion Request,	
5.	Click the Sele	ct All link.							
	Select All De	select All							
6.	Click the Acce	ept button.							
	Accept	Rej	ect						



Step	Action
The Acce Delegatio	Performation Request page displays with a Confirmation message indicating that the on Request has been accepted.
	Accept Delegation Request
	Environmental Manager I
	You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.
	OK
7.	Click the OK button. The process for accepting a Delegation Request is complete.
8.	Click the Reject button.
The Reje Delegatio	ct Delegation Request page displays with a Confirmation message indicating that the on Request has been rejected.
I	Reject Delegation Request
	Environmental Manager I
Р г	'ou have rejected a delegation request. Refer to the My Delegated Authorities page to view rejected delegation equests.
	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.

Step	Action	
1.	Navigate to the Manage Delegation page using the following path: Menu > Self Service > Manage Delegation	
The Man	age 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	
	transaction. Review My Proxies	
	Select <i>Review My Delegated Authorities</i> 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.	Click the Review My Delegated Authorities link.	
	Review My Delegated Authorities	
The My I	Delegated Authorities page displays.	
м	ly Delegated Authorities	
-		
F	inancial Services Manager I	
TI M	his page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the atching requests. Select the information icon for request details.	
	Show Requests by Status Submitted Refresh	
Se Re	elect All Deselect All eturn to Manage Delegation	



Step	Action								
3.	Select the app button.	licable Req	uest Status	to view (using th	e Show	Requests	s by Status dro	opdown
	Show Requests	by Status	ubmitted	\checkmark					
	The Request S	Status optio	ns are:						
1	 Accept Ended Rejecte Revoke Submit 	ed ed ed ted							
4.	Click the Refre	esh button.							
The My C	Delegated Auth	orities pag	e refreshes	with the	search	results.			
My D	elegated Authorities								
Finan	sial Sanvicae Managar I								
This p match	age allows you to view your deleg ing requests. Select the informatio	ated authorities. Select in icon for request detai	a particular status and sel ls.	lect Refresh to sh	ow the				
	Show Requests by Status	Rejected		Refresh					
Choos	se Delegate								
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	
	Manage Approve Payable Time		Financial Services Manager II	10/16/2020	10/16/2020	Rejected	Inactive	0	
Select Return	All Deselect All to Manage Delegation			•		,			
5.	Review the De	legation Re	equests that	meet the	e select	ed Requ	uest Status	S.	
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	
	Manage Approve Payable Ti	me	Financial Service Manager II	²⁸ 10/16/2020	10/16/2020	Rejected	Inactive	0	



Step	Action									
İ	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.									
	My Delegated Authorities									
	Financial Services Manager I									
	This page allows you to view you matching requests. Select the infe	r delegated authorition. Select a prmatio Accepted	particular status and se	elect Refresh to sl	now the					
	Show Requests by Show R	Status Ended Rejected Revoked Submitted		Refresh						
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details		
	Manage Approve Reporte	d SUMITRA SHRESTHA	Financial Services Manager II	10/16/2020	10/16/2020	Accepted	Active	0		
	Select All Deselect Al Return to Manage Delegation	I								
		arah ragulta h	and on th		od Dog	upot Sto				
My Fir	Polegated Authorities Incial Services Manager I Is page allows you to view your delegg	ated authorities. Select a particul	ar status and select Re	fresh to show the		-				
	Show Requests by Status	Accepted	E	Refresh						
Ch	oose Delegate									
	Transaction	Name Job	Title From	Date To Da	ate Requ Statu	est Delega s Status	ation	Details		
	Manage Approve Reported	Fina Man	ncial Services 10/16 ager II	6/2020 10/16	/2020 Accep	oted Active		0		
Sel	ect All Deselect All turn to Manage Delegation									



TA373_Delegation Administration for Supervisors

TA Delegation Example (Best Business Practice)



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