

Delegation Administration for Delegation Administrators Overview

This job aid provides step-by-step instructions for Delegation Administrators to manage time and absence delegations on behalf of supervisors including:

- Creating/Revoking Delegation requests on behalf of TL and AM Supervisors
- Viewing the status of delegation requests

Important Reminders for Delegation:

- Approval authority should only be delegated to a user with a Cardinal TL Supervisor or AM Supervisor role in Cardinal HCM.
- It is never recommended to delegate down to one of the supervisor's direct report employees. See the TA Delegation Example at the end of this Job Aid for examples of best business practice delegation.
- All transaction types must be delegated for the delegate to have access to enter, correct, submit, review and approve time and absences.
- 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.

There Are 5 Tiles in Delegation:

- **Create Delegation Request** – Supervisors use this tile to delegate their TA transactions to another Reports To supervisor to enter, correct, submit, and approve transactions on their behalf.
- **My Delegates** – Supervisors use this tile to review all delegations that have been initiated by themselves or initiated by a Delegation Administrator. The Supervisor can review Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations.
- **My Delegated Authorities** – Supervisors use this tile to review all delegations where they are the delegate. The supervisor can review their Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations.
- **Administer Delegation** – the Delegation Administrators use this tile to view and revoke delegations on behalf of the delegator.
- **Administer Create Delegation** – the Delegation Administrator uses this tile to delegate a Reports To supervisor's transactions to another Reports To supervisor to enter, correct, submit, and approve time/absences on the delegator's behalf.



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Revision History

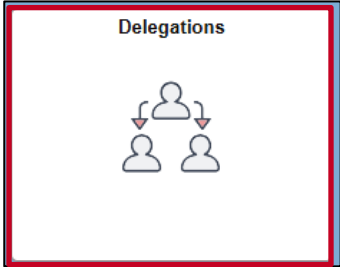
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
11/25/2025	Updated language to clarify steps related to the beginning and ending dates for Delegation Requests for an approver.

Administer Create Delegation

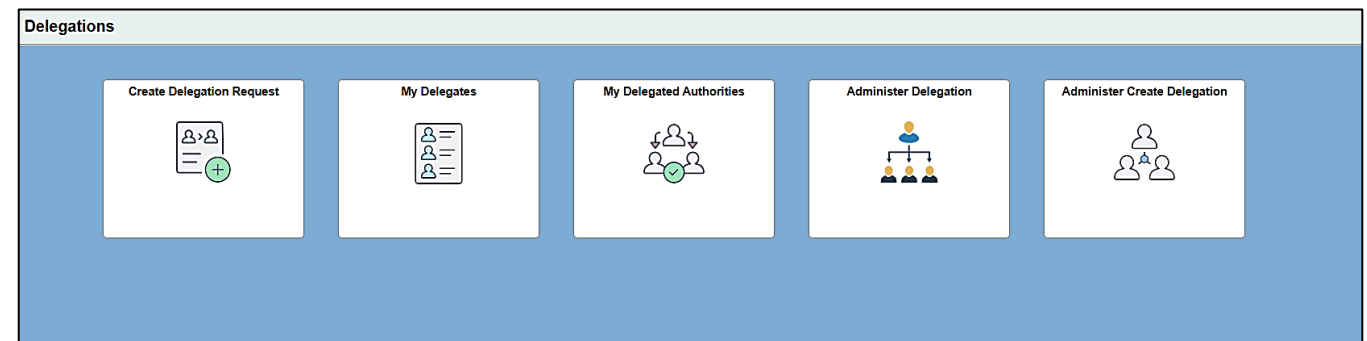
The following steps are used by a Delegation Administrator to create a delegation request on behalf of TL Supervisors and Absence Management (AM) Supervisors.

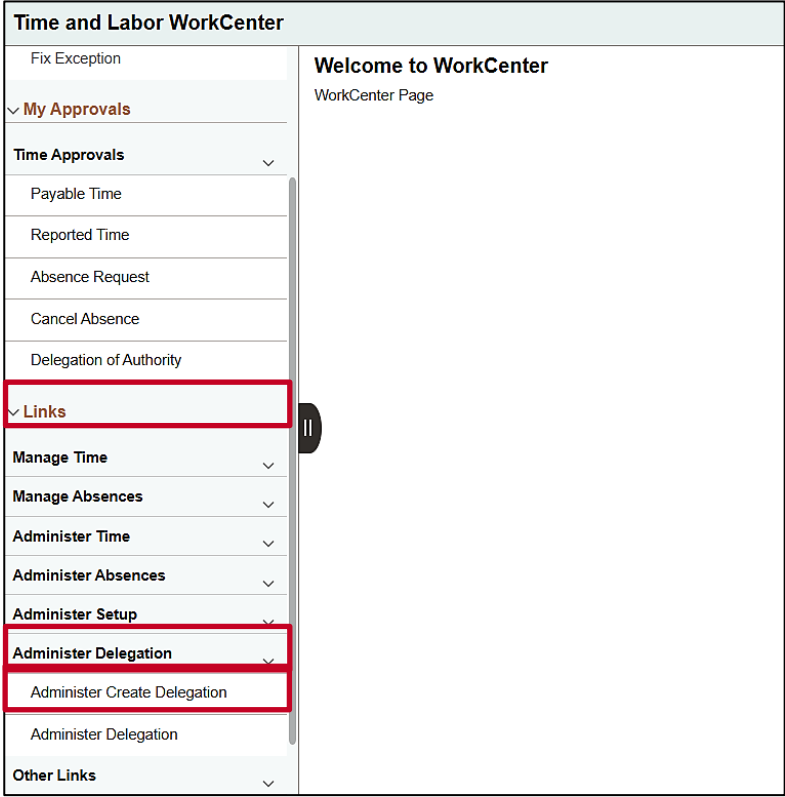
Approval authority should only be delegated to a user with a Cardinal TL Supervisor or AM Supervisor role in Cardinal HCM.

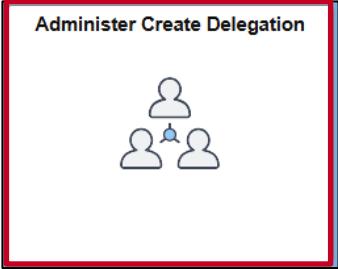
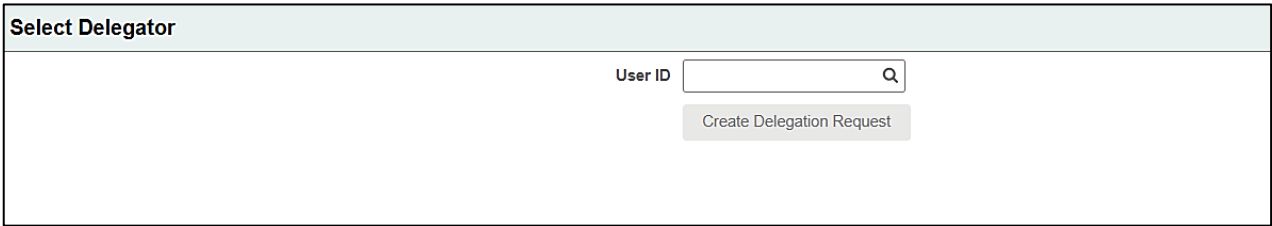
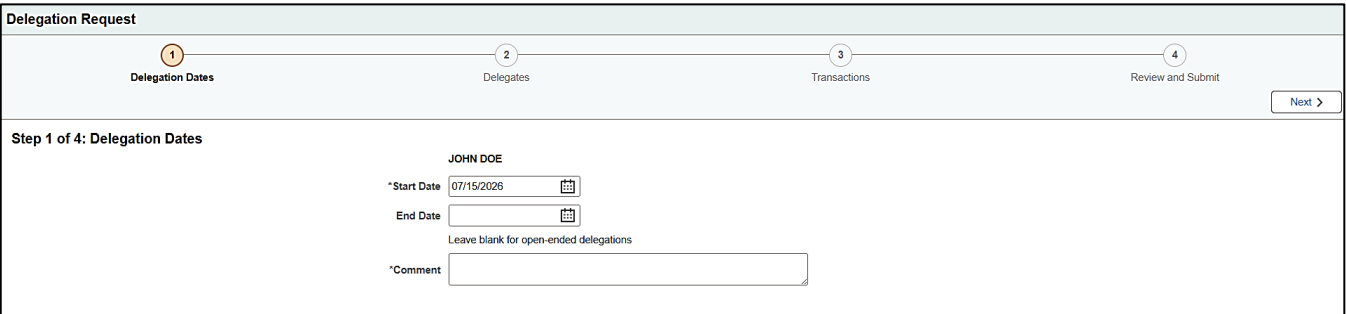
Delegation cannot be used when a Reports To position is vacant, or when the Reports To supervisor is suspended or on Leave of Absence (paid leave, unpaid leave, LOA Working). In these scenarios, Cardinal will route approvals to the supervisor's Reports To supervisor.

Step	Action
1.	Navigate to the Administer Create Delegation page by clicking the Delegations tile. 

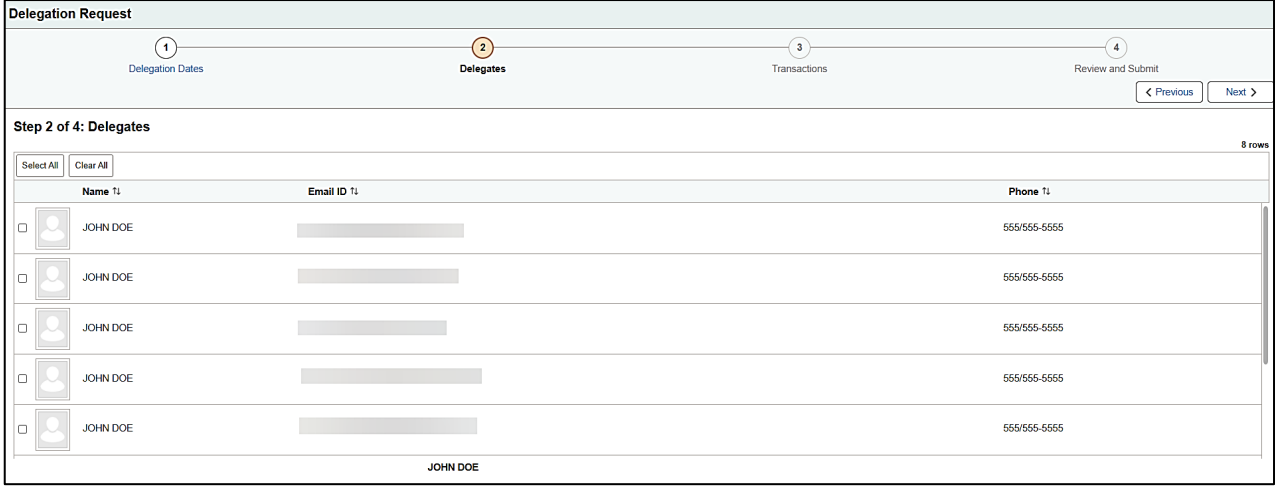
The **Delegations** page displays.



Step	Action
	Five tiles display: • Create Delegation Request – the Supervisor can use this tile to delegate their worklist to another Reports To supervisor to approve transactions on the user's behalf. • My Delegates – the Supervisor can use this tile to review all delegations that have been initiated. The user can review Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations. • My Delegated Authorities – the Supervisor can use this tile to review all delegations where the user will serve as the delegate. The user can review their Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations. • Administer Delegation – the Delegation Administrator can use this tile to view, reassign, and revoke delegations, as well as view past delegations. • Administer Create Delegation – the Delegation Administrator can use this tile to delegate a Reports To supervisor's worklist to another Reports To supervisor to approve transactions on the delegator's behalf.
	Delegation Administrators can also access the Administer Create Delegation page by going through the TA WorkCenter tile. Use the following navigation path in the WorkCenter: Links > Administer Delegation > Administer Create Delegation Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

Step	Action
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning .
2.	Click the Administer Create Delegation tile. 
The Select Delegator page displays. 	
3.	Click the User ID lookup icon to search for the employee or type in their User ID. 
4.	Once the User ID is added, the Create Delegation Request button will be enabled. Click the Create Delegation Request button. 
The Delegation Request page displays Step 1 of the Delegation Request process, Delegation Dates. 	

Step	Action
5.	Click the Start Date Calendar icon and select the applicable date. This is the date the delegation will begin. *Start Date 07/15/2026 
	If immediate approval of transactions is needed, enter or select today's date. Once the delegate accepts the delegation, all pending transactions will route to the delegate for approval. When a future Start Date is entered, approvals will begin routing to the delegate starting on the selected date, after the delegation has been accepted.
6.	Click the End Date Calendar icon and select the applicable to date. This is the date the delegation will end. End Date 
	Enter an End Date to ensure the delegation ends automatically. If the End Date field is left blank, the delegation will stay active until it is manually revoked. If the delegate does not accept or reject the request within seven days from the date the request was submitted, Cardinal will automatically revoke the request.
7.	Enter a comment in the Comment field. Note: This is a required field. *Comment Supervisor is on vacation with an expected return on 7/25/26.
	The comment should be related to the reason why the transactions are being delegated (e.g., attending a conference, on vacation). Please do not include any personal or confidential information.
8.	Click the Next button. Next >

Step	Action
The Delegation Request page displays Step 2 of the Delegation process, Delegates. 	
	If the delegator has multiple jobs, there will be another Step where the appropriate job will need to be selected before moving forward.
9.	Click the Select checkbox for the applicable delegate. Note: Multiple delegates can be selected. 
	When multiple delegates are selected, existing pending transactions get routed to the first delegate to accept the delegation request. Newly created transactions after the delegation is accepted route to all delegates who have accepted the request.
10.	Click the Next button. 



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Step	Action
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The **Delegation Request** page displays with Step 3 of the Delegation process, **Transactions**.

Delegation Request

1 Delegation Dates 2 Delegates 3 Transactions 4 Review and Submit

< Previous Next >

JOHN DOE

Step 3 of 4: Transactions

All Approve Initiate

Select All Clear All

Description ↑↓

- ☐ Absence Cancellation
- ☐ Approve Report Time Fluid
- ☐ Benefits Attachment Approval
- ☐ Dependent Attachment Approval
- ☐ Manage Approve Payable Time
- ☐ Manage Report Time Fluid
- ☐ Manager Abs Cancellation Fluid
- ☐ Manager Absence Approve
- ☐ Manager Absence Balance Fluid
- ☐ Manager Absence History Fluid
- ☐ Manager Absence Request Fluid

11 rows

11. Click the **Select All** button to select all transactions.

All Approve Initiate

Select All Clear All

Description ↑↓

- ☒ Absence Cancellation
- ☒ Approve Report Time Fluid
- ☒ Benefits Attachment Approval
- ☒ Dependent Attachment Approval
- ☒ Manage Approve Payable Time
- ☒ Manage Report Time Fluid
- ☒ Manager Abs Cancellation Fluid
- ☒ Manager Absence Approve
- ☒ Manager Absence Balance Fluid
- ☒ Manager Absence History Fluid
- ☒ Manager Absence Request Fluid



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Step	Action
	When creating Delegation Requests, it will default to All transactions. Always select all of the Transaction Types. All Approve Initiate
12.	Click the Next button. < Previous Next >
The Delegation Request page displays Step 4 of the Delegation process with the Delegation Details section. Delegation Request 1 Delegation Dates 2 Delegates 3 Transactions 4 Review and Submit < Previous Submit Step 4 of 4: Review and Submit JOHN DOE Delegation Details Start Date 07/15/2026 End Date 07/31/2026 Comment Supervisor is on a short medical leave. Delegates JOHN DOE Transactions Absence Cancellation Approve Report Time Fluid Benefits Attachment Approval Dependent Attachment Approval Manage Approve Payable Time Manage Report Time Fluid Manager Abs Cancellation Fluid Manager Absence Approve Manager Absence Balance Fluid Manager Absence History Fluid Manager Absence Request Fluid	
	If changes need to be made, use the Previous button to go back to the section(s) that require updating. If all the information is accurate, proceed to the next step.
13.	Review the information to verify it is accurate and click the Submit button. < Previous Submit



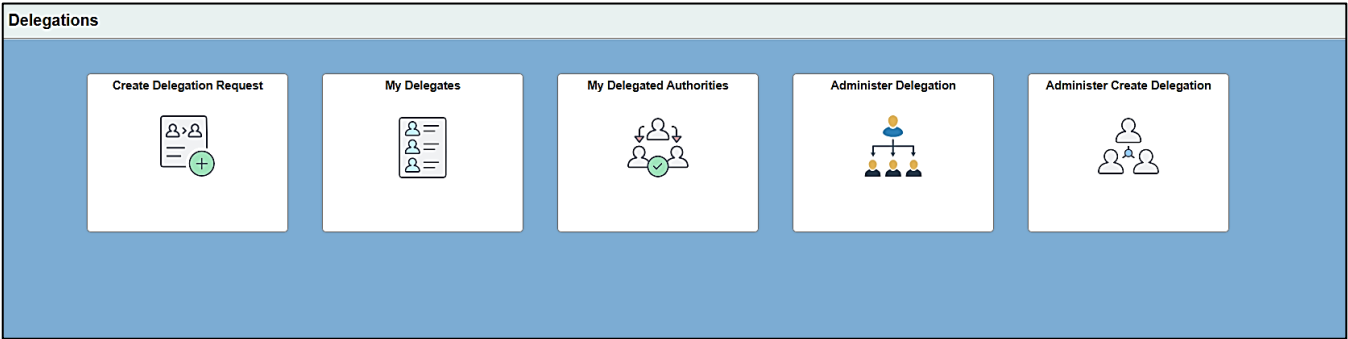
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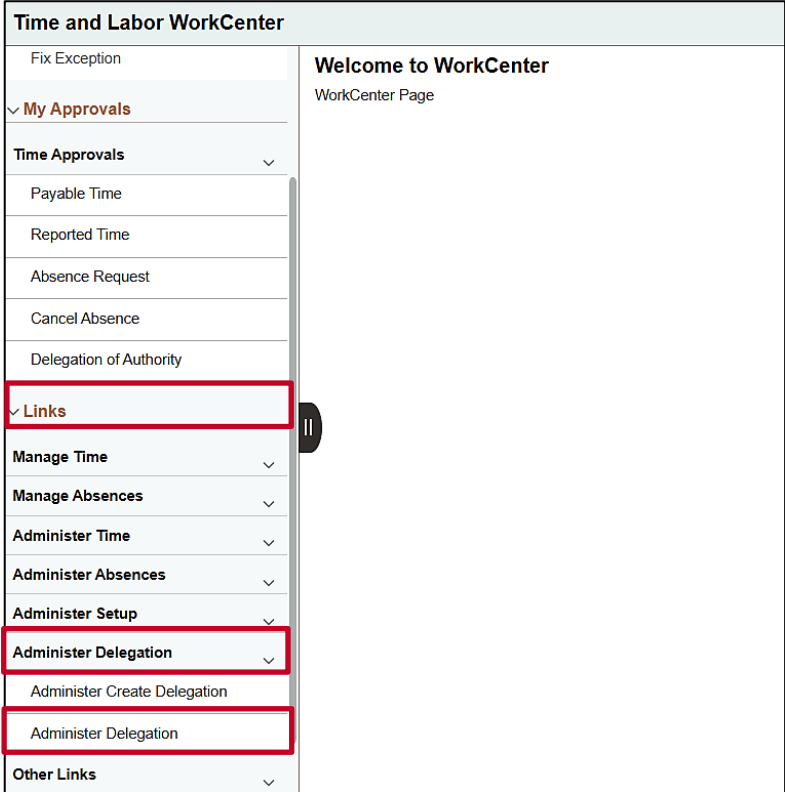
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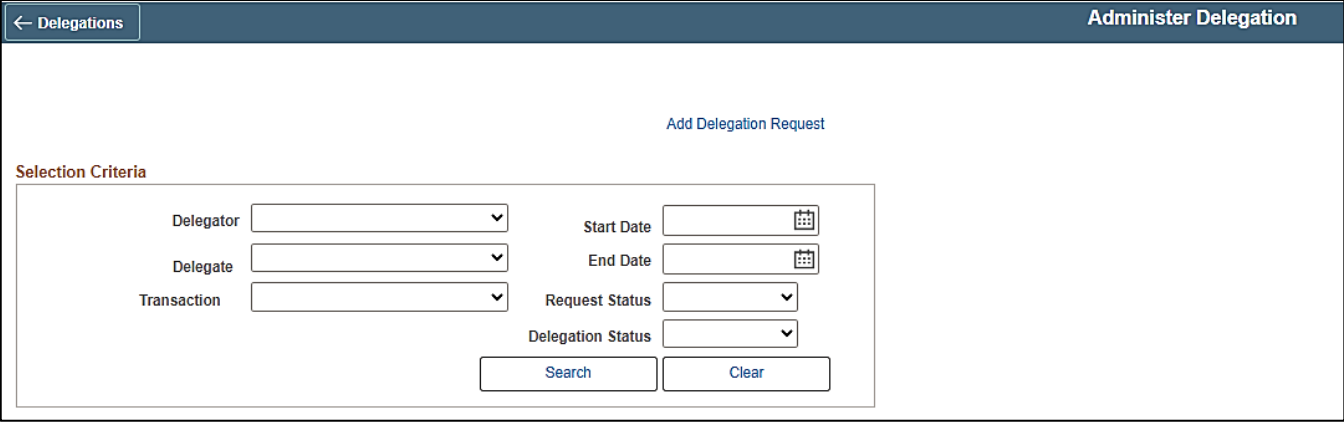
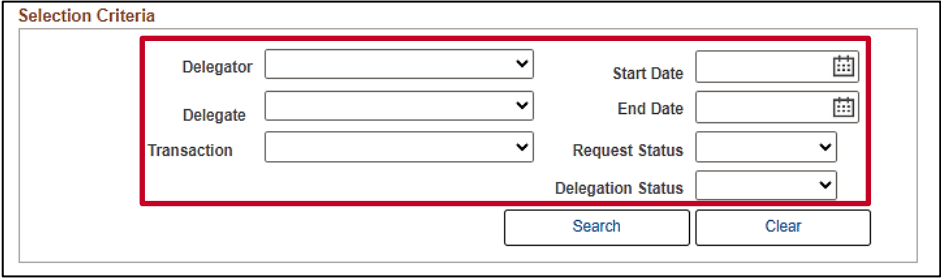
Step	Action
	The request is submitted and the Delegations page displays. Delegations Create Delegation Request  My Delegates  My Delegated Authorities  Administer Delegation  Administer Create Delegation 

Administer Delegation

Delegation Administrators can view all active and inactive delegations, including those initiated by Supervisors, through the Administer Delegation tile.

Step	Action
1.	Navigate to the Administer Delegation page by clicking the Delegations tile. 
The Delegations page displays. 	
	Five tiles display: • Create Delegation Request – the Supervisor can use this tile to delegate their worklist to another Reports To supervisor to approve transactions on the user's behalf. • My Delegates – the Supervisor can use this tile to review all delegations that have been initiated. The user can review Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations. • My Delegated Authorities – the Supervisor can use this tile to review all delegations where the user will serve as the delegate. The user can review their Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations. • Administer Delegation – the Delegation Administrator can use this tile to view, reassign, and revoke delegations, as well as view past delegations. • Administer Create Delegation – the Delegation Administrator can use this tile to delegate a Reports To supervisor's worklist to another Reports To supervisor to approve transactions on the delegator's behalf.

Step	Action
	Users can also access the Administer Delegation page by clicking the TA WorkCenter tile. Use the following navigation path in the WorkCenter: Links > Administer Delegation > Administer Delegation Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Click the Administer Delegation tile. 

Step	Action
	The Administer Delegation page displays. 
	Below is a description of the search criteria fields: • Delegator: Enter/select the person for whom the TA transactions belong (Reports To) • Delegate: 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”
3.	Enter the applicable search criteria to search for a delegation (or group of delegations) using any of the search criteria fields in the Selection Criteria section. 
4.	Click the Search button. 



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Step

Action

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

← Delegations

Administer Delegation

Add Delegation Request

Selection Criteria

DelegatorJOHN DOE

Delegate

Transaction

Start Date07/15/2026

End Date07/31/2026

Request Status

Delegation Status

Search

Clear

Search Results

Delegation Request

Request Details

ID

	Transaction	Delegator	Delegator Name	Delegate	Delegate Name
☐	Absence Cancellation		JOHN DOE		JOHN DOE
☐	Benefits Attachment Approval		JOHN DOE		JOHN DOE
☐	Dependent Attachment Approval		JOHN DOE		JOHN DOE
☐	Manager Absence Approve		JOHN DOE		JOHN DOE
☐	Manager Absence Balance Fluid		JOHN DOE		JOHN DOE
☐	Manager Abs Cancellation Fluid		JOHN DOE		JOHN DOE
☐	Manager Absence History Fluid		JOHN DOE		JOHN DOE
☐	Manager Absence Request Fluid		JOHN DOE		JOHN DOE
☐	Approve Report Time Fluid		JOHN DOE		JOHN DOE
☐	Manage Report Time Fluid		JOHN DOE		JOHN DOE
☐	Manage Approve Payable Time		JOHN DOE		JOHN DOE

Select All

Deselect All

Revoke

5.

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

Delegation Request

Request Details



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Step	Action
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The **Request Details** tab displays.

← Administer Delegation

Administer Delegation

Add Delegation Request

Selection Criteria

Delegator

JOHN DOE

▼

Delegate

▼

Transaction

▼

Start Date

07/15/2026

End Date

07/31/2026

Request Status

▼

Delegation Status

▼

Search

Clear

Search Results

Delegation Request

Request Details

ID>

	Start Date	End Date	Status	Delegation Status	Notify Delegator
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐
☐	07/15/2026	07/31/2026	Submitted	Inactive	☐

Select All

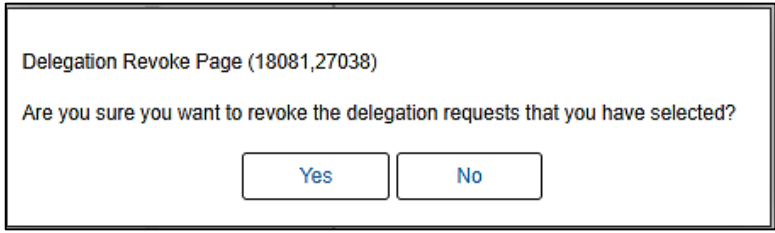
Deselect All

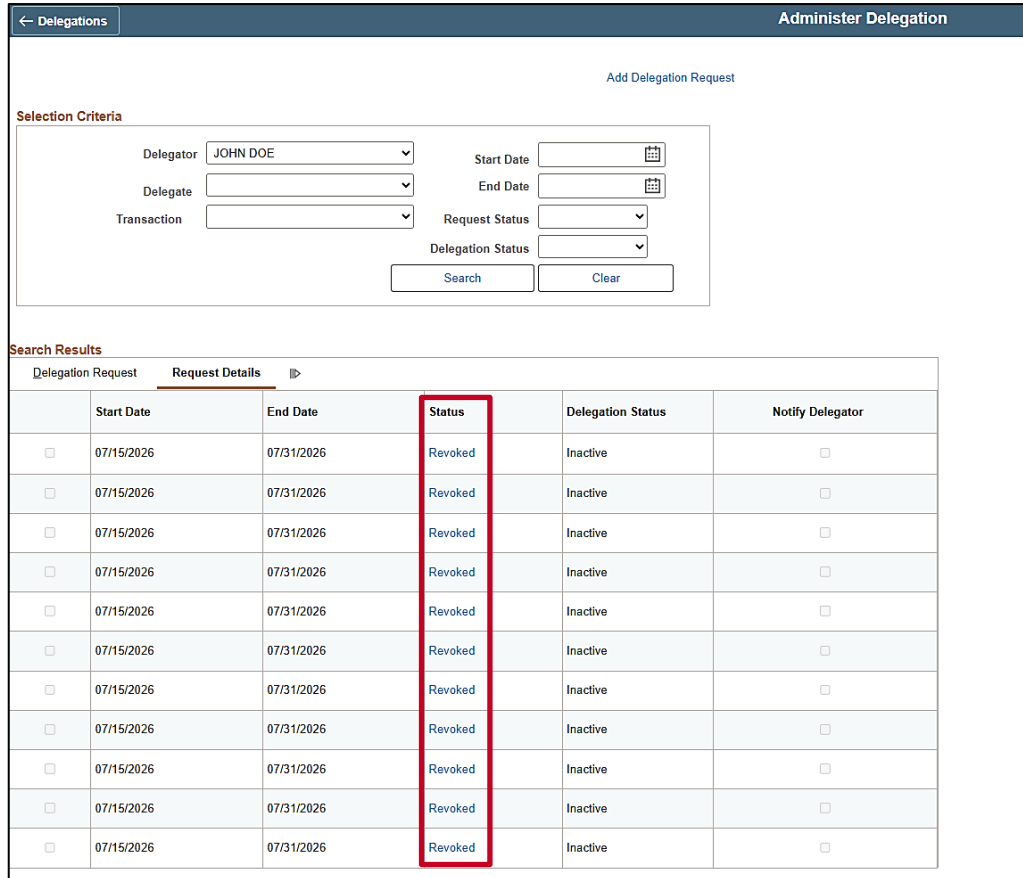
Revoke

6. Click the **Select** checkbox option(s) for the applicable Delegation Request(s) to revoke delegated items. This can be done from either the **Delegation Request** tab or the **Request Details** tab.

	Start Date
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026
☒	07/15/2026

Select All

Step	Action
	Click the Select All button to select all of the Delegation Requests. 
7.	Once the checkbox(es) are selected, the Revoke button will be enabled. Click on the Revoke button. 
A message displays in a pop-up window confirming the decision to revoke the selected Delegation Requests. 	
8.	Click the Yes button. 

Step	Action
	The page saves and refreshes with the Status column showing “Revoked”. 
	Delegations only need to be revoked if the delegation should end prior to the End Date or if an End Date was not entered. The delegation will automatically expire on the end date, and any pending approvals will be returned to the Reports To Supervisor. To reassign delegated items: Revoke the original delegated items by following Step 6 above. Create a new delegation by following the steps in the Administer Create Delegation section of this Job Aid.

TA Delegation Example (Best Business Practice)

