Delegating Approvals in Cardinal Financials Overview

This Job Aid provides step-by-step instructions for delegation of approvals to another person (Delegate). In Cardinal Financials, approvals can only be delegated for the following:

- Vouchers
- Expense Transactions (Travel Authorizations, Cash Advances, and Expense Reports)
- Journals
- Purchase Orders
- Requisitions

The Delegator can only delegate approval authority to a user (Delegate):

- Within the same Business Unit
- With the same approval roles (e.g., Vouchers, Expenses, Journals, etc.) for the transactions being delegated

This allows the Delegate to approve or deny designated transactions on behalf of the Delegator.

Delegation requests that are not approved, accepted, or denied within 7 days of the request will be automatically revoked.

Email Notifications are sent for the following:

- The Delegate will receive an email indicating a delegation request has been sent
- The Delegator will receive an email when a delegation request has been accepted or rejected
- The Delegate will receive an email when a delegation request is revoked by the Delegator

This Job Aid includes instructions for the following:

- Creating a delegation request
- Revoking a delegation request
- Accepting or rejecting a delegation request as the Delegate
- Viewing the status of delegation requests

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.

Table of Contents

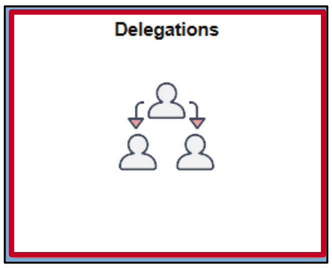
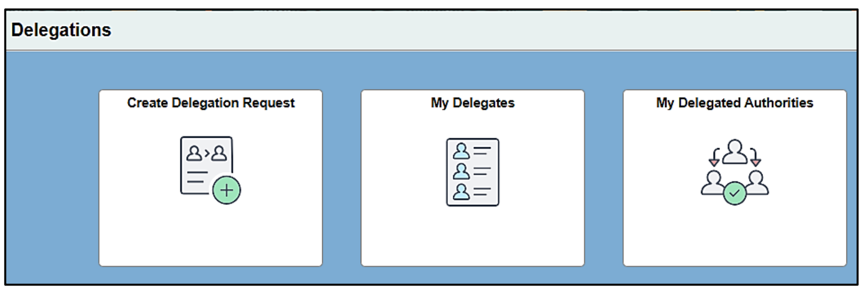
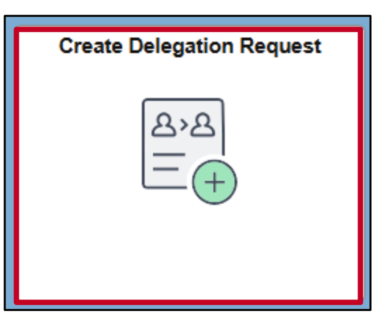
Revision History

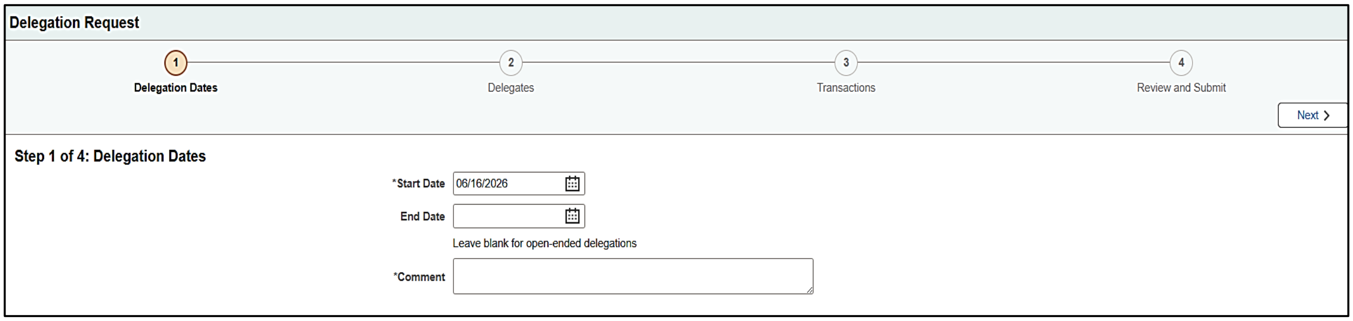
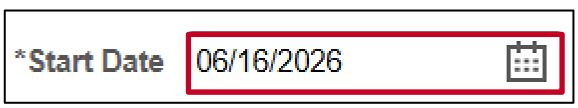
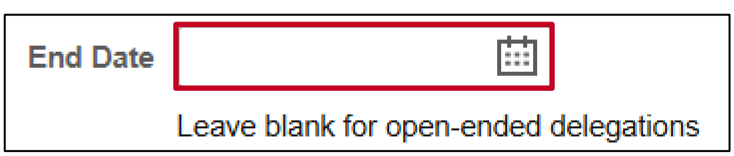
Revision Date	Summary of Changes
9/1/2026	Baseline.

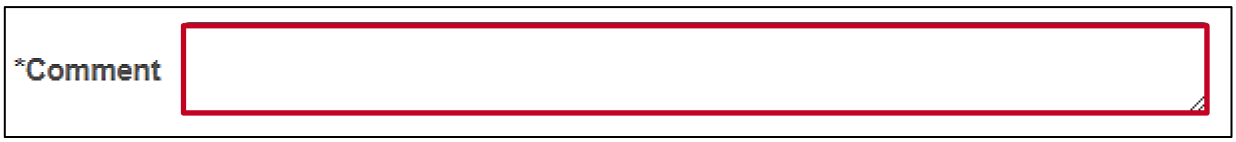
Creating a Delegation Request

This section of the Job Aid will provide step-by-step instructions for entering a delegation request. This is used when a Delegator wants to delegate approvals to a Delegate.

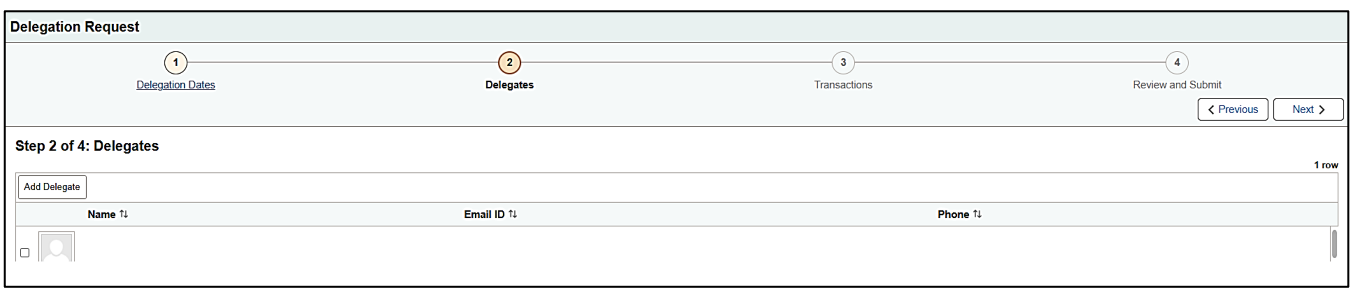
Note: The Delegations tile is only visible to users with the applicable user roles.

Step	Action
1.	Click the **Delegations** tile on the Cardinal Financials Homepage. 
The **Delegations** page displays three tiles. 	
	• **Create Delegation Request** – used by the Delegator to create a delegation request that is sent to a designated Delegate(s) • **My Delegates** – used by the Delegator to review all delegation transactions (“Active”, “Accepted, “Rejected”, “Revoked”, “Submitted”, and “Ended”) • **My Delegated Authorities** – used by the Delegate to view transactions delegated to them by a Delegator For this scenario a delegation request will be created.
2.	Click the **Create Delegation Request** tile. 

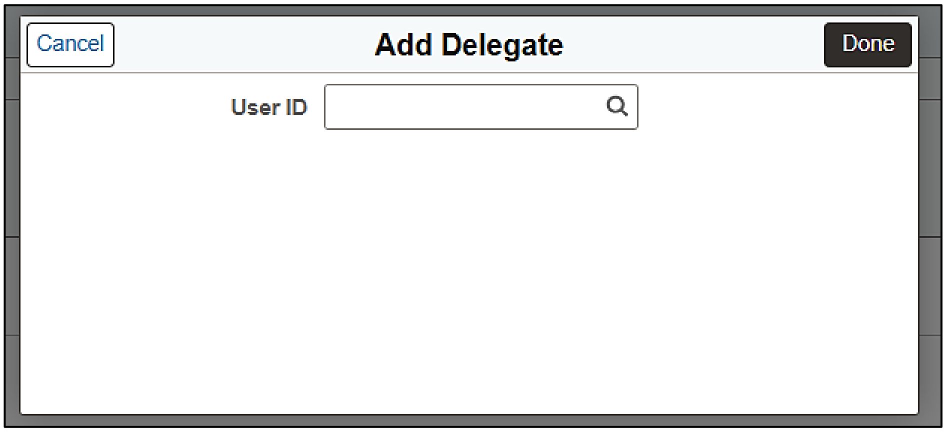
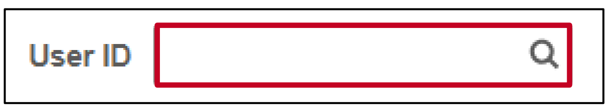
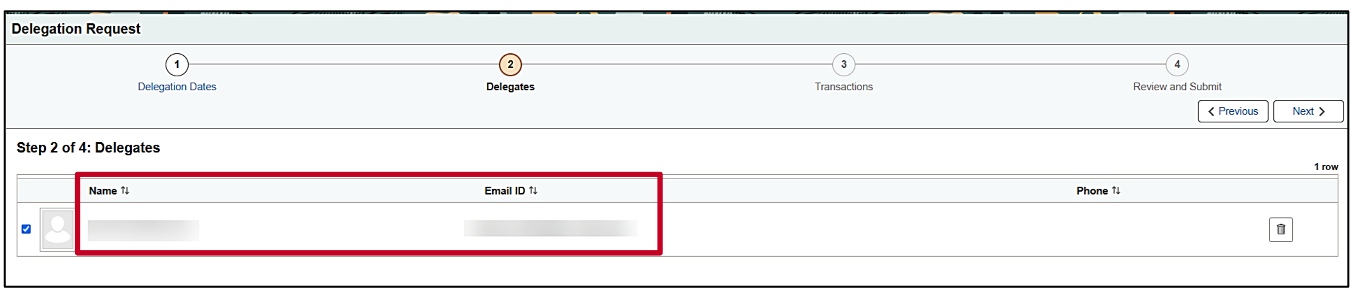
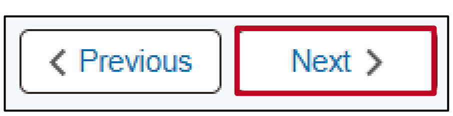
Step	Action
	The **Delegation Request** page displays. 
ℹ	The **Delegation Request** page displays four steps as outlined in the Header of the page. 1. Delegation Dates 2. Delegates 3. Transactions 4. Review and Submit Each step number highlights as the Delegator moves through the process.
3.	Enter or update the **Start Date** field as applicable. This is the date the delegation will begin. 
ℹ	If immediate approval of a transaction is needed, enter or select today’s date. Once the Delegate accepts the delegation, they will be able to approve any pending transactions. When a future “Start Date” is entered, approval will begin routing to the Delegate starting on the selected date, after the delegation has been accepted. If the “Start Date” entered/selected is more than 30 days in the future or past, a Warning message displays. If the date is accurate, click the **OK** button and proceed. 
4.	Enter or select the applicable date in the **End Date** field. This is the date the delegation will end. 

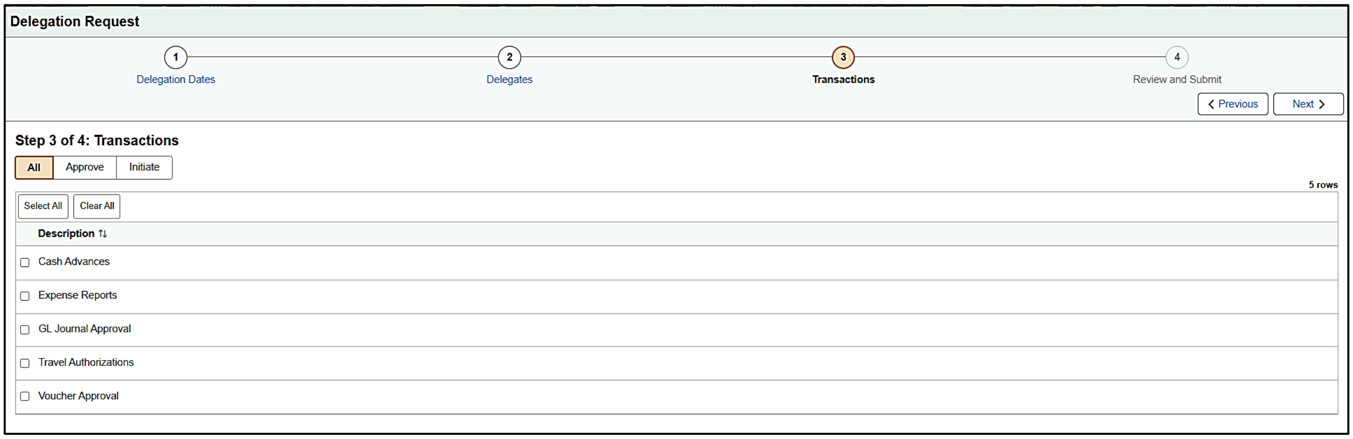
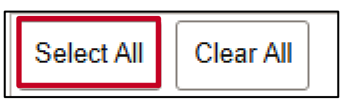
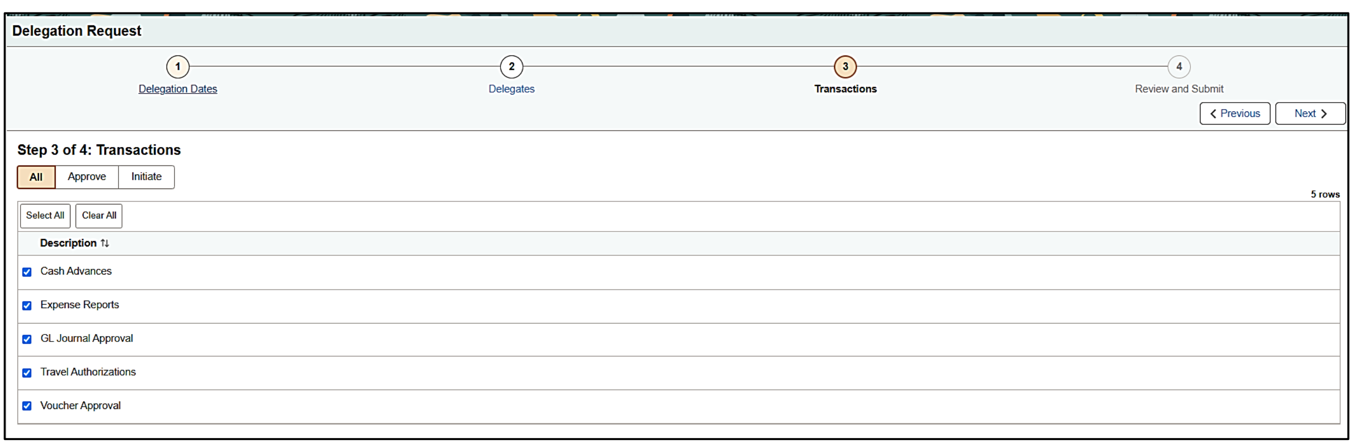
Step	Action
	Enter an "End Date" to ensure the delegation ends automatically. If the **End Date** field is left blank, once the Delegate approves the request, the delegation will stay active until it is manually revoked. If the Delegate does not accept or reject the request within 7 days from the date the request was submitted, Cardinal will automatically revoke the request.
5.	Enter an applicable comment in the **Comment** field. 
	The comment should be related to the reason why the transactions are being delegated (e.g., attending a conference, on vacation, etc.). Please do not include any personal or confidential information.
6.	Click the **Next** button at the top right of the page. 

The **Delegates** page (Step 2) displays.

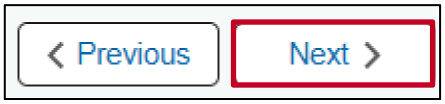
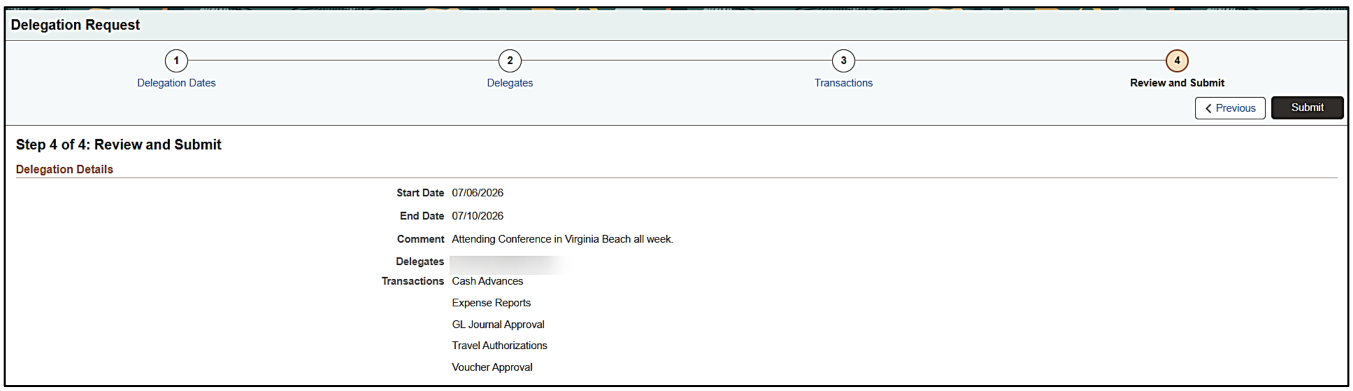


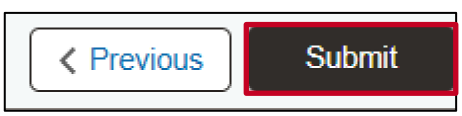
Step	Action
7.	Click the **Add Delegate** button. 

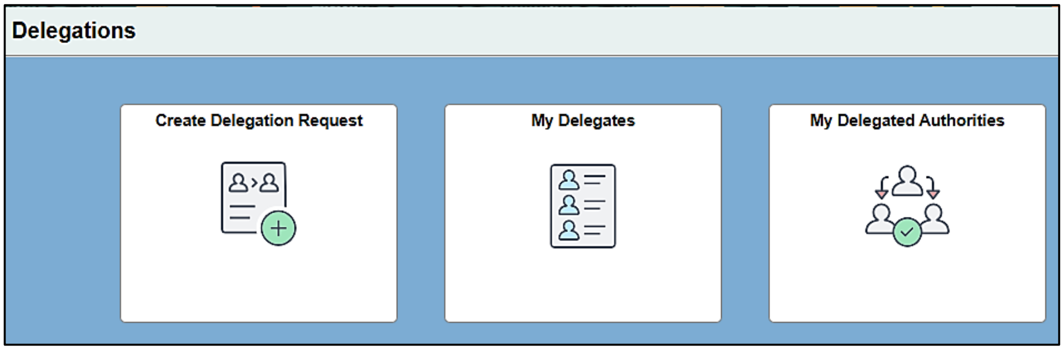
Step	Action
	The **Add Delegate** page displays in a pop-up window. 
8.	Enter or use the **User ID Look up** icon to select the User ID for the applicable Delegate. 
9.	Click the **Done** button. 
	The page refreshes and the selected Delegate displays. 
	The selected Delegate information displays in the **Name** and **Email ID** fields.
10.	Verify the correct Delegate displays.
11.	Click the **Next** button. 

Step	Action
	The **Transactions** (Step 3) page displays. 
	The Delegator can select specific transactions to delegate to a specific Delegate or select all transactions. If the Delegator wants different Delegates to handle different transactions, the Delegator will need to select the specific transactions for the first Delegate and complete the delegation and then create another delegation request for the additional Delegate for applicable transactions. Only one delegation request for one Delegate can be created at one time. For this scenario all transactions will be delegated to the same Delegate.
12.	Click the **Select All** button. 
	All transaction checkboxes are selected. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>The transactions listed in the Description section are only for approvals, not for initiations. Clicking "All" or clicking "Approve" shows the exact same list.

There is no need to navigate to the Approve or Initiate tabs.</td></tr>
<tr><td>13.</td><td>Click the Next button.

</td></tr>
<tr><td colspan="2">The Review and Submit (Step 4) page displays.

</td></tr>
<tr><td>14.</td><td>Review the information to verify it is accurate.</td></tr>
<tr><td></td><td>If changes need to be made, use the Previous button to go back to the page(s) that require updating.

If all the information is accurate, proceed to the next step.</td></tr>
<tr><td>15.</td><td>Click the Submit button.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The request is submitted and the Delegations page redisplays.

</td></tr>
<tr><td></td><td>The selected Delegate will receive an email notification indicating a delegation request has been submitted. If a delegation request is not accepted or rejected within 7 days of the request, Cardinal will automatically revoke the request.

To see the status of delegated requests, see the Viewing the Status of Delegation Requests section of this Job Aid for more details.</td></tr>
</table>

Revoking a Delegation Request

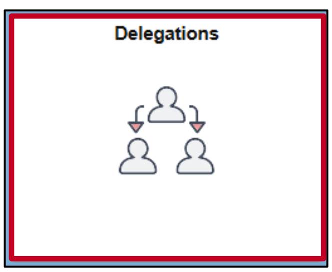
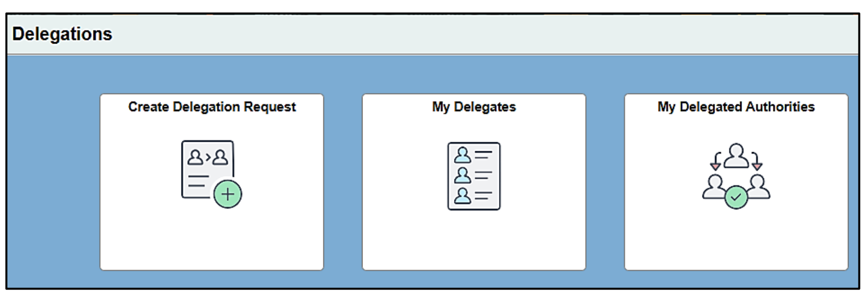
When the Delegator revokes a delegation request. it cancels the request. If a Delegate does not accept or reject a delegation request within 7 days of the date it was requested, Cardinal automatically revokes the request.

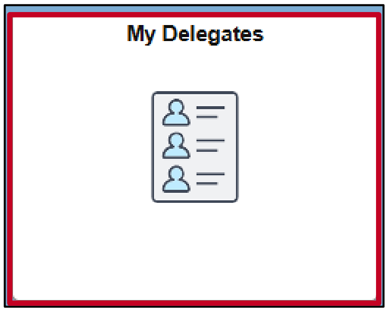
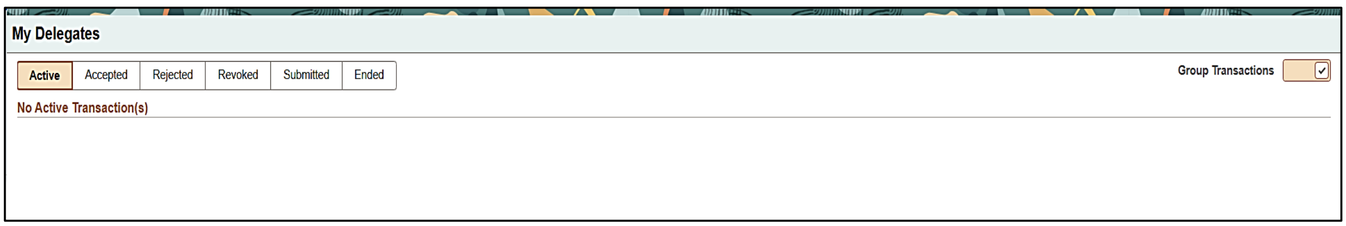
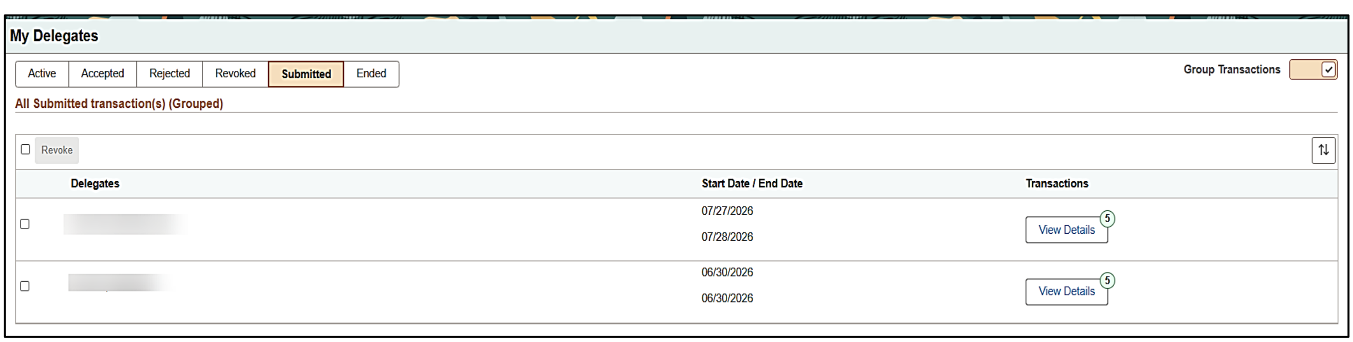
Revoking can be done even if the Delegate has accepted the delegation request.

When multiple transactions have been delegated to a Delegate, the Delegator can revoke all transactions or specific transactions.

When a delegation request is revoked by the Delegator, the Delegate receives an email notification indicating the delegation was revoked.

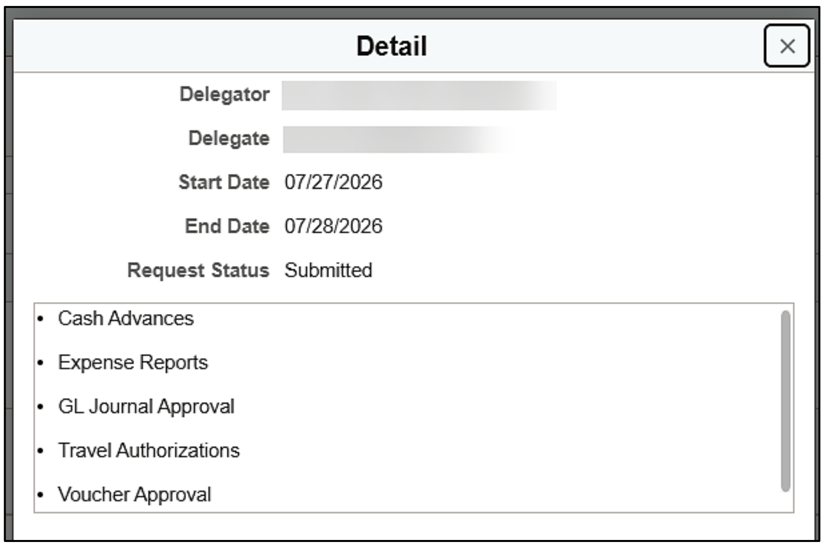
In this section of the Job Aid, the following steps are used by a Delegator to revoke (take back) delegation requests.

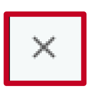
Step	Action
1.	Click the **Delegations** tile on the Cardinal Financials Homepage. 
The **Delegations** page displays three tiles.  	
	• **Create Delegation Request** – used by the Delegator to create a delegation request that is sent to a designated Delegate(s) • **My Delegates** – used by the Delegator to review all delegation transactions (“Active”, “Accepted, “Rejected”, “Revoked”, “Submitted”, and “Ended”) • **My Delegated Authorities** – used by the Delegate to view transactions delegated to them by a Delegator For this scenario a delegation request will be revoked.

Step	Action
2.	Click the **My Delegates** tile. 
The **My Delegates** page displays.  	
	Six tabs display on this page as follows: • **Active** • **Accepted** • **Rejected** • **Revoked** • **Submitted** • **Ended** For this scenario, a submitted request that has not been accepted will be revoked.
3.	Click the **Submitted** tab. 
The **Submitted** page displays with submitted delegation requests listed by default.  	

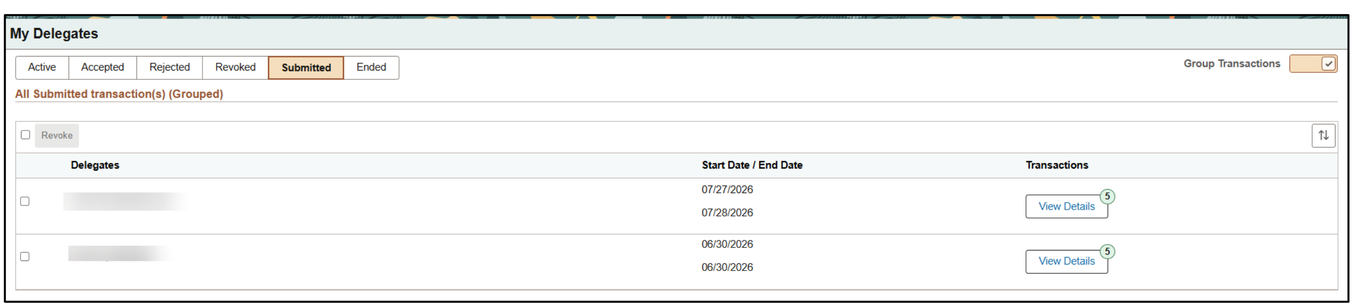
Step	Action
(info)	This page will only display transactions that have not been accepted or rejected by the Delegate. For this scenario, the **Transaction** field displays a **View Details** button with a count of “5”, which indicates the number or transactions submitted to that specific Delegate. The Delegator can revoke all transactions or can select specific transactions to revoke.
4.	Click the **View Details** button to see a list of transactions included in the delegation request. 

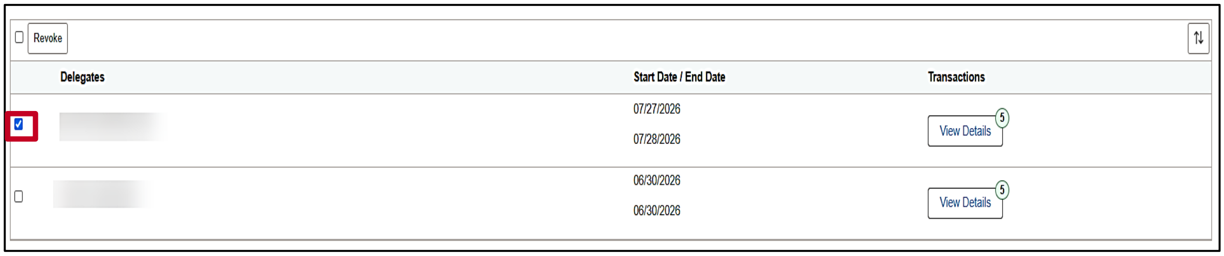
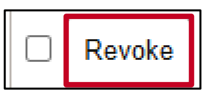
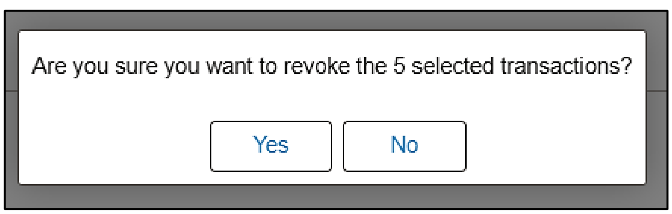
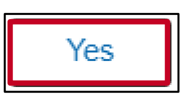
The **Detail** page displays in a pop-up window.



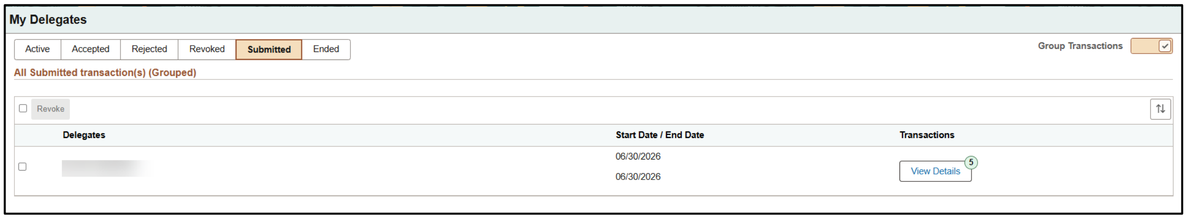
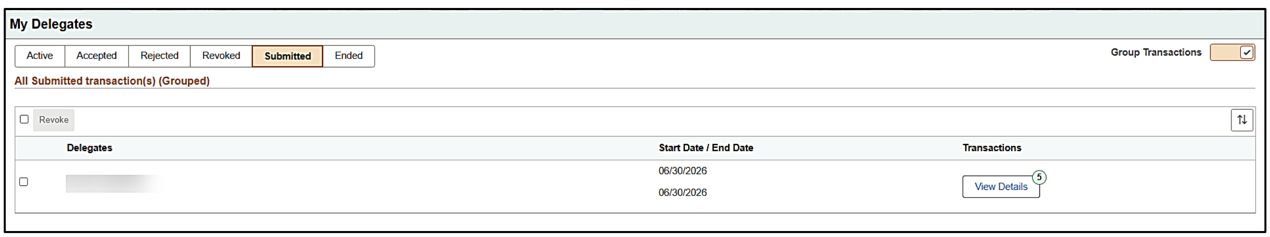
Step	Action
5.	Click the “x” to close the page. 

The **My Delegates – Submitted** page redisplays.



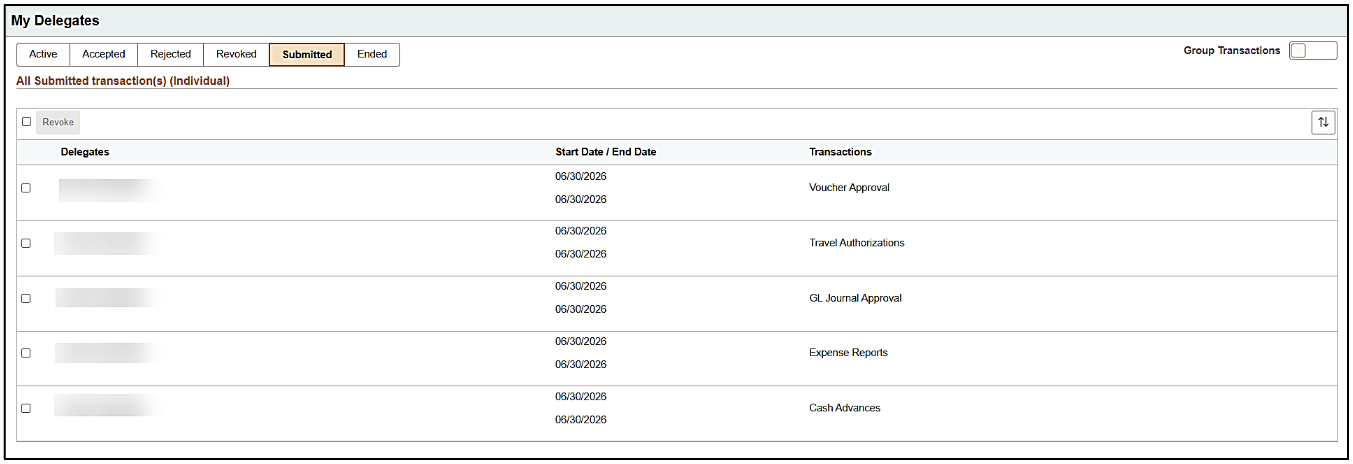
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>For this scenario, the Delegator will revoke all transactions for one of the delegates and will revoke two transactions for the other delegate.
To revoke all transactions, proceed to the next Step.
To revoke specific transactions, proceed to Step 9.</td></tr>
<tr><td>6.</td><td>Click the checkbox next to the Delegate that will have all transactions revoked.

</td></tr>
<tr><td></td><td>The Revoke button is enabled.</td></tr>
<tr><td>7.</td><td>Click the Revoke button.

</td></tr>
<tr><td colspan="2">A confirmation messages displays in a pop-up window.

</td></tr>
<tr><td>8.</td><td>Click the Yes button.

</td></tr>
<tr><td colspan="2">A confirmation message displays at the top of the page.

</td></tr>
</table>

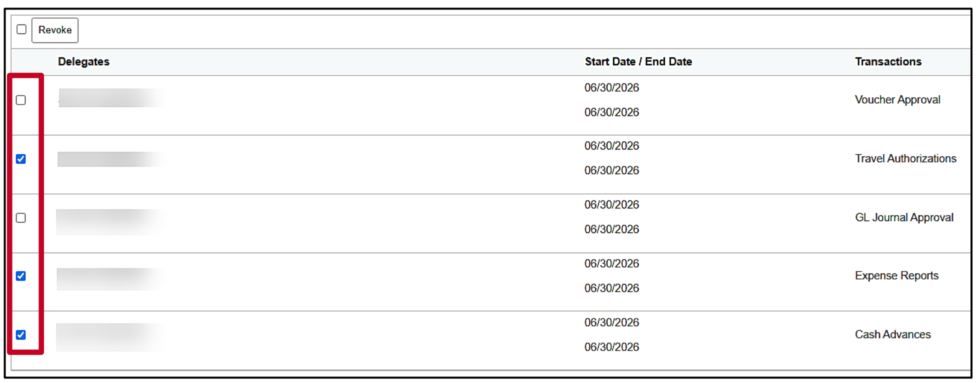
Step	Action
	The page refreshes and any remaining delegations display. 
	When a delegation is revoked, it cannot be updated or changed. A new request must be created if the Delegator wants transactions to be delegated. The Delegate will receive an email when a delegation request is revoked. The next steps will go through the Steps for revoking delegation requests for specific transactions.
	 For this scenario, the Delegator wants to revoke three (3) of the five (5) transactions and delegate the revoked transactions to another Delegate. A message at the top of the Submitted page indicates that All Submitted transaction(s) are Grouped. This means all the delegated transactions are combined within a request and grouped into one line.
9.	Click the **Group Transactions** toggle to view the individual transactions. 

Step	Action

The page refreshes and each transaction is now displayed on an individual line.



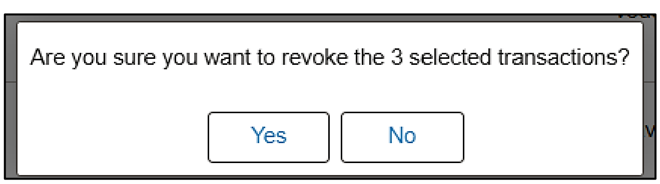
10. Click the checkbox in front of the specific transactions to be revoked.

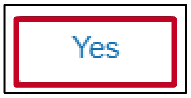


The **Revoke** button is enabled.

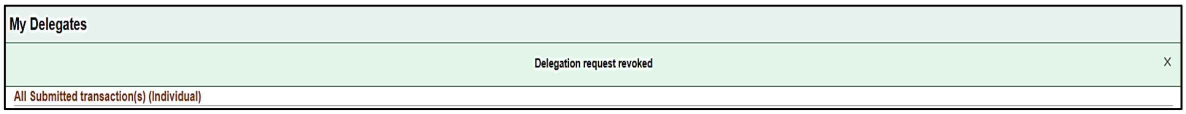
11. Click the **Revoke** button.

A message displays confirming you want to revoke the selected transactions (in this scenario 3).

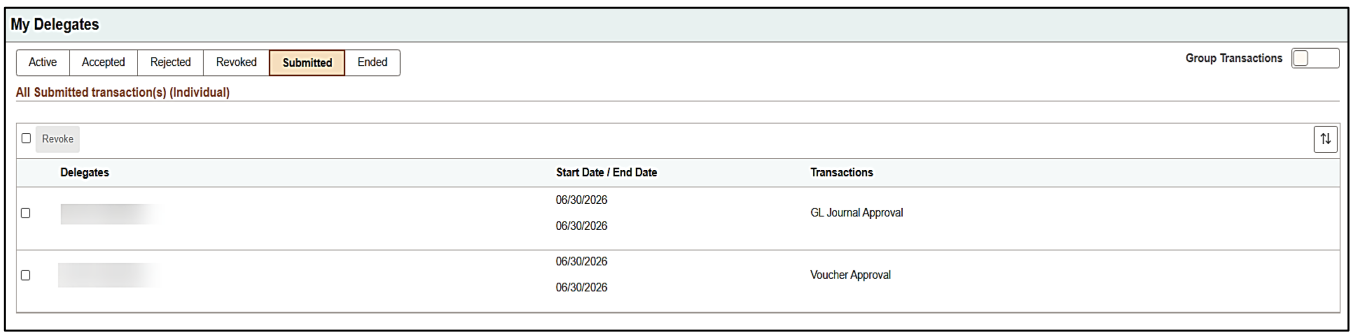


Step	Action
12.	Click the **Yes** button to confirm. 

A confirmation message displays at the top of the page.



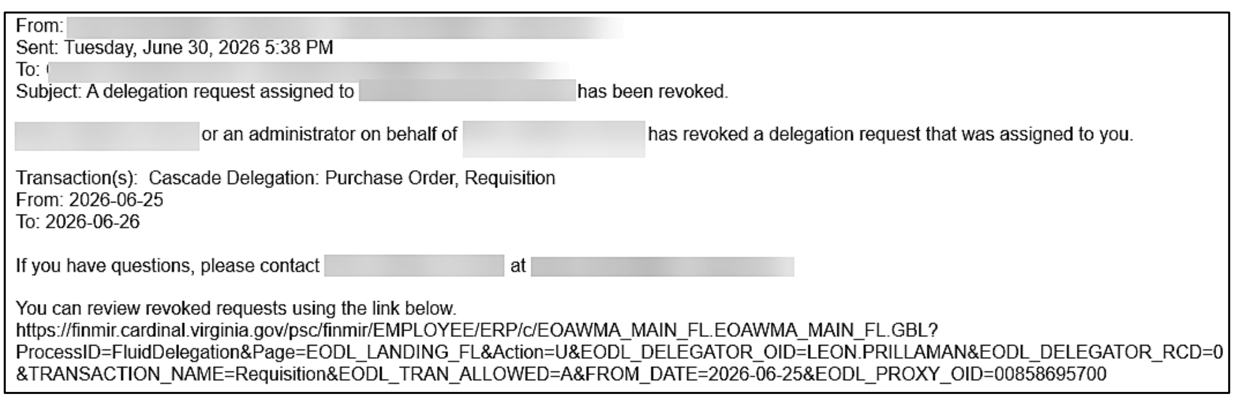
The page refreshes and the selected revoked transactions are removed.



When a delegation is revoked, it cannot be updated or changed. A new request must be created if the Delegator wants transactions to be delegated.

The Delegate receives an email notification indicating the delegation request was revoked.

Sample Email



From:
Sent: Tuesday, June 30, 2026 5:38 PM
To:
Subject: A delegation request assigned to has been revoked.

or an administrator on behalf of has revoked a delegation request that was assigned to you.

Transaction(s): Cascade Delegation: Purchase Order, Requisition
From: 2026-06-25
To: 2026-06-26

If you have questions, please contact at

You can review revoked requests using the link below.
https://finmir.cardinal.virginia.gov/psc/finmir/EMPLOYEE/ERP/c/EOAWMA_MAIN_FL.EOAWMA_MAIN_FL.GBL?ProcessID=FluidDelegation&Page=EODL_LANDING_FL&Action=U&EODL_DELEGATOR_OID=LEON.PRILLAMAN&EODL_DELEGATOR_RCD=0&TRANSACTION_NAME=Requisition&EODL_TRAN_ALLOWED=A&FROM_DATE=2026-06-25&EODL_PROXY_OID=00858695700

Accepting or Rejecting a Delegation Request as the Delegate

When a Delegator delegates transactions to Delegate, Cardinal will send an email notification indicating a delegation request has been submitted.

Sample email:

From: [redacted]
Sent: Wednesday, June 17, 2026, 11:20 AM
To: [redacted]
Subject: A delegation request from [redacted] has been submitted for review and acceptance

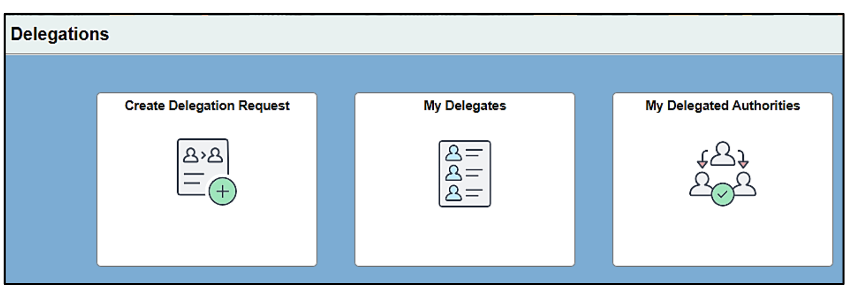
[redacted] or an administrator on behalf of [redacted] has submitted a delegation request to you.

Transaction(s): [redacted] Delegation - Email: Purchase Order, Requisition
From: 2026-06-17
To: 2026-06-18

You can review the request, then accept or reject the request, using the link below.
https://finmir.cardinal.virginia.gov/psc/finmir/EMPLOYEE/ERP/c/EOAWMA_MAIN_FL.EOAWMA_MAIN_FL.GBL?ProcessID=FluidDelegation&Page=EODL_LANDING_FL&Action=U&EODL_DELEGATOR_OID=LEON.PRILLAMAN&EODL_DELEGATOR_RCD=0&TRANSACTION_NAME=Requisition&EODL_TRAN_ALLC
06-17&EODL_PROXY_OID=00858695700

This section of the Job Aid will walk through the steps to accept and/or reject Delegation Requests as the Delegate.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click the Delegations tile on the Cardinal Financials Homepage.

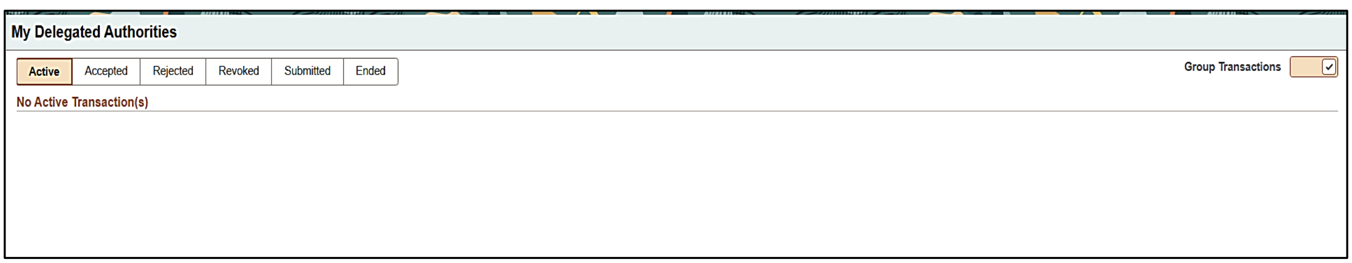
</td></tr>
<tr><td></td><td>A number displays on this tile if the Delegate has active delegation request(s) that have not been accepted or rejected.</td></tr>
<tr><td colspan="2">The Delegations page displays three tiles.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

- **Create Delegation Request** – used by the Delegator to create a delegation request that is sent to a designated Delegate(s)
- **My Delegates** – used by the Delegator to review all delegation transactions (“Active”, “Accepted, “Rejected”, “Revoked”, “Submitted”, and “Ended”)
- **My Delegated Authorities** – used by the Delegate to view transactions delegated to them by a Delegator

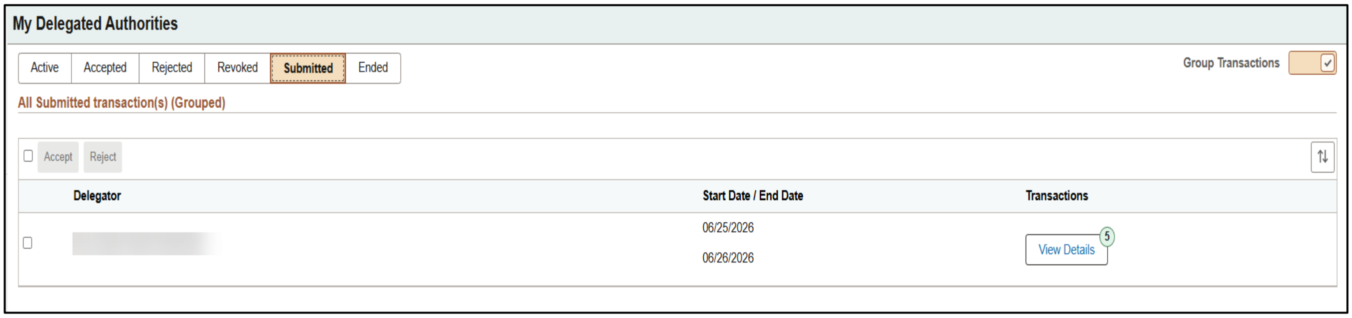
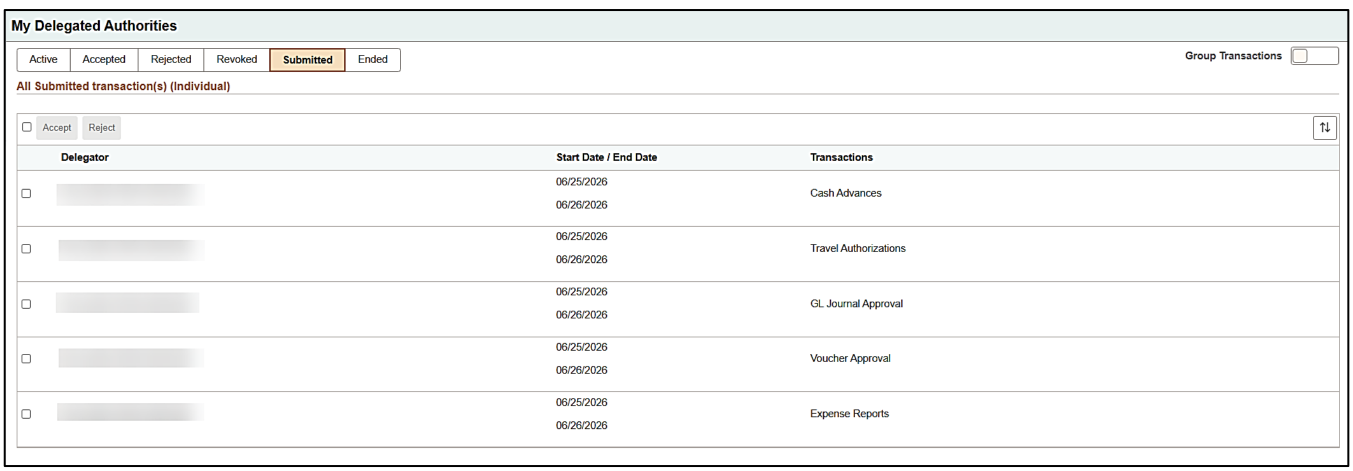
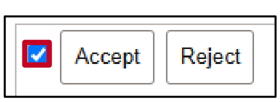
For this scenario the steps to accept and reject delegation requests will be reviewed.</td></tr>
<tr><td>2.</td><td>Click the My Delegated Authorities tile.

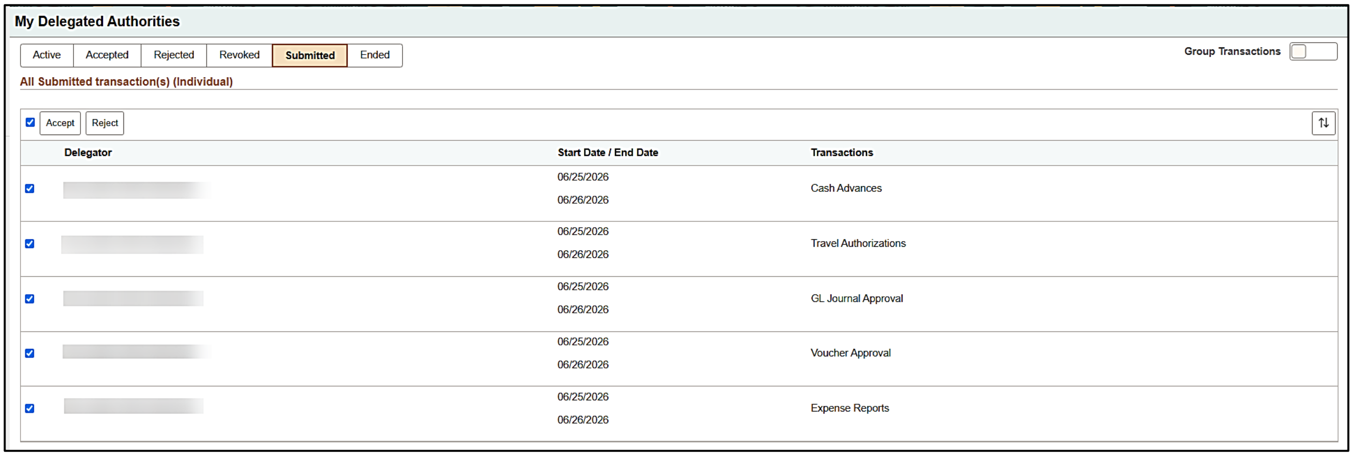
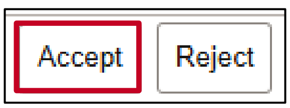
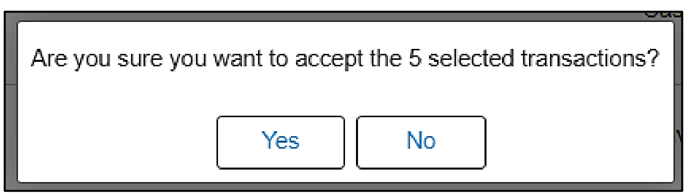
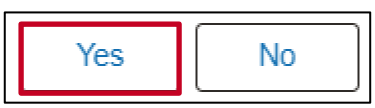
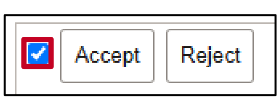
</td></tr>
<tr><td colspan="2">The My Delegated Authorities page displays with the Active tab displayed by default.

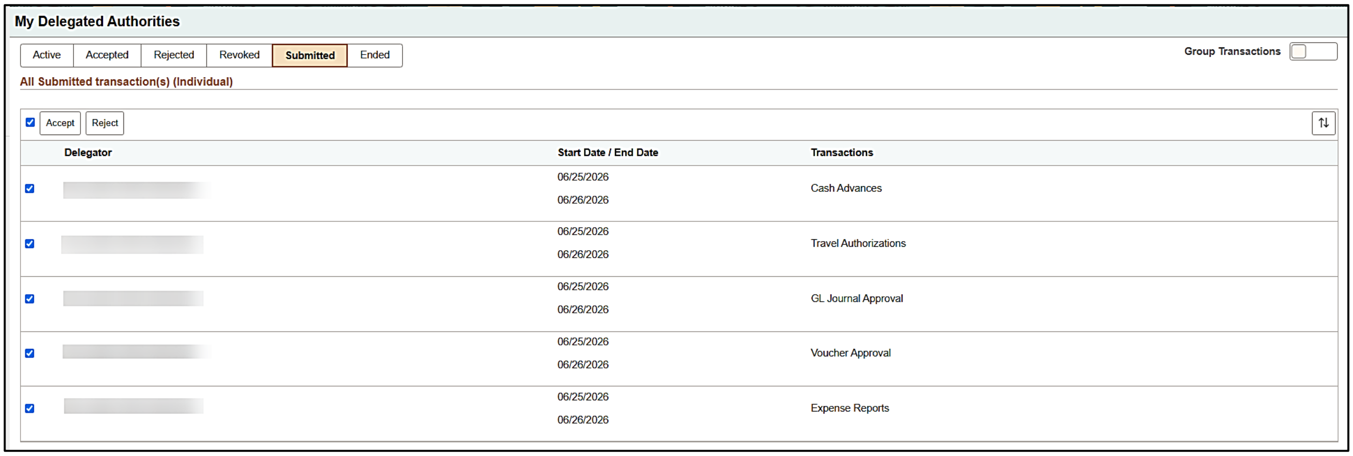
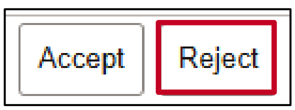
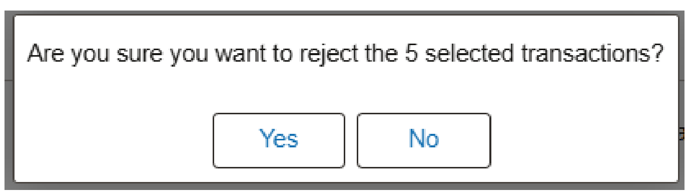
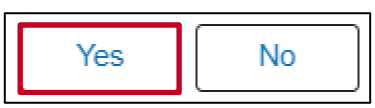


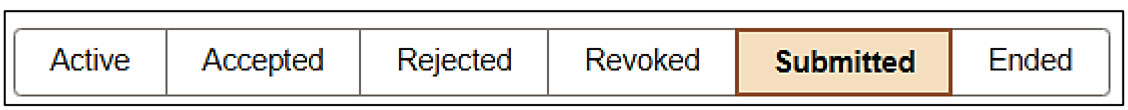
</td></tr>
<tr><td></td><td>The Active page displays current requests that have already been submitted and accepted by the Delegate.</td></tr>
<tr><td>3.</td><td>Click the Submitted tab to view any requests that have been submitted for review.

</td></tr>
</table>

Step	Action
The **Submitted** page displays. 	
	The **Group Transactions** toggle is selected by default, which means this page defaults with all the transactions within a request grouped into one line. The number of transactions within the group is the number that displays next to the **View Details** button.
4.	Click the **Group Transactions** toggle in the upper right hand corner to view all transactions sent through the delegation requests. 
The **My Delegated Authorities Submitted** page refreshes. 	
	To accept a delegation request, proceed to next Step. To reject a delegation request, proceed to **Step 8**.
5.	Click the checkbox next to the **Accept** and **Reject** buttons to enable the buttons. 

Step	Action
All Transaction checkboxes are selected. 	
6.	Click the **Accept** button. 
A message displays to confirm acceptance. 	
7.	Click the **Yes** button to confirm the acceptance. 
	The page refreshes and the process for accepting a Delegation Request is complete. The Delegator will receive an email once the Delegate approves/accepts a delegation request
8.	Click the checkbox next to the **Accept** and **Reject** buttons to enable the buttons. 

Step	Action
All transaction checkboxes are selected. 	
9.	Click the **Reject** button if the delegation request is not going to be accepted. 
A message displays to confirm rejecting the transactions. 	
10.	Click the **Yes** button to confirm the rejection. 

Step	Action
	The page refreshes and the process for rejecting a Delegation Request is complete. When a Delegation request is rejected, an email notification is sent to the Delegator. **Sample Email** From: Sent: Tuesday, June 30, 2026 5:48 PM To: Subject: has rejected a delegation request that you submitted. has rejected a delegation request that you submitted. Here are the details: Request Status: Rejected Transactions: Reject Delegation: Requisition From: 2026-07-02 To: 2026-07-03 You can review the request using the link below. https://finmir.cardinal.virginia.gov/psc/finmir/EMPLOYEE/ERP/c/EOAWMA_MAIN_FL.EOAWMA_MAIN_FL.GBL?ProcessID=FluidDelegation&Page=EODL_LANDING_FL&Action=U&EODL_DELEGATOR_OID=LEON.PRILLAMAN&EODL_DELEGATOR_RCD=0&TRANSACTION_NAME=Requisition&EODL_TRAN_ALLOWED=A&FROM_DATE=2026-07-02&EODL_PROXY_OID=00858695700
	Delegates can also **Accept** and **Reject** specific transactions by selecting the specific transactions and clicking the applicable button.
11.	• Click the **Accepted** tab to view the list of accepted transactions. • Click the **Rejected** tab to view the list of rejected transaction. See the Viewing the Status of Delegation Requests section of this Job Aid for details on viewing delegation requests. 

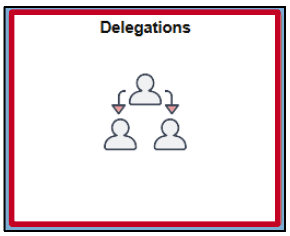
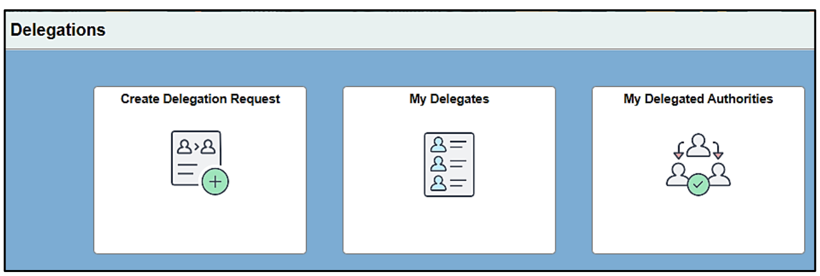
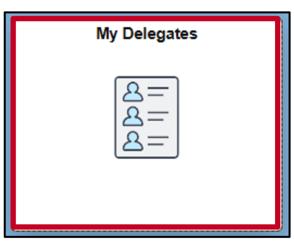
Viewing the Status of Delegation Requests

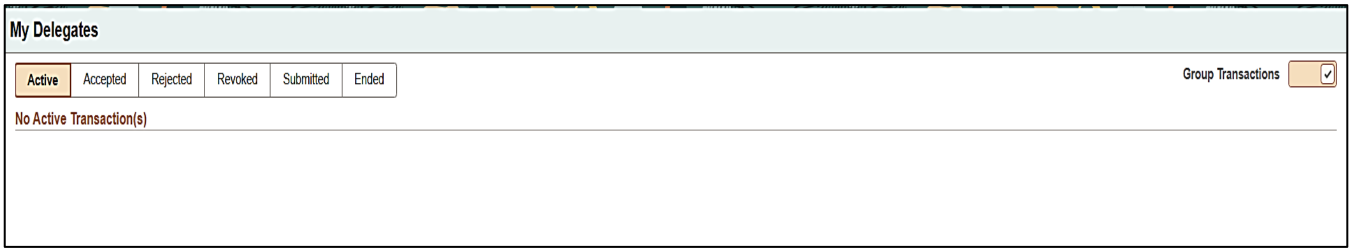
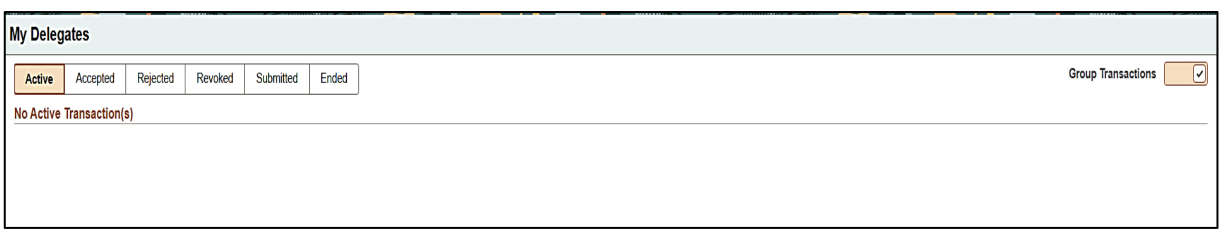
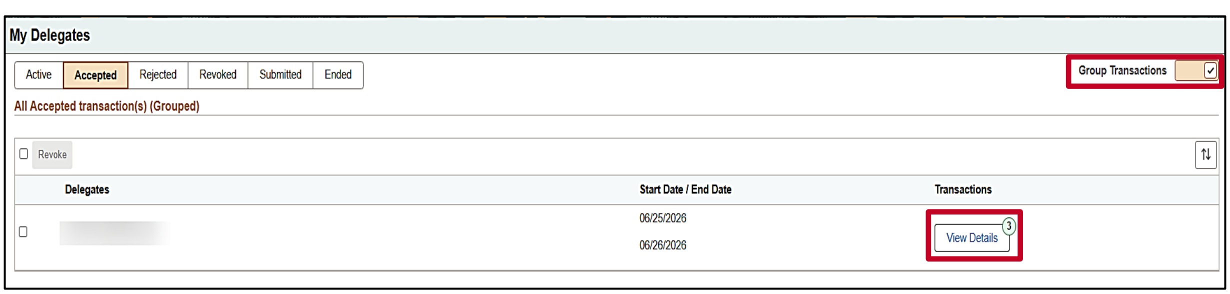
The **My Delegates** and **My Delegated Authorities** tiles can be used to view delegation transactions.

This section of the Job Aid will review how to access and view information for each.

My Delegates

The **My Delegates** tile is used by the Delegator to view requests that they delegated to a Delegate. This section of the Job Aid will walk through the steps to access it and review the information that displays.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click the Delegations tile on the Cardinal Financials Homepage.

</td></tr>
<tr><td colspan="2">The Delegations page displays.

</td></tr>
<tr><td>2.</td><td>Click the My Delegates tile.

</td></tr>
</table>

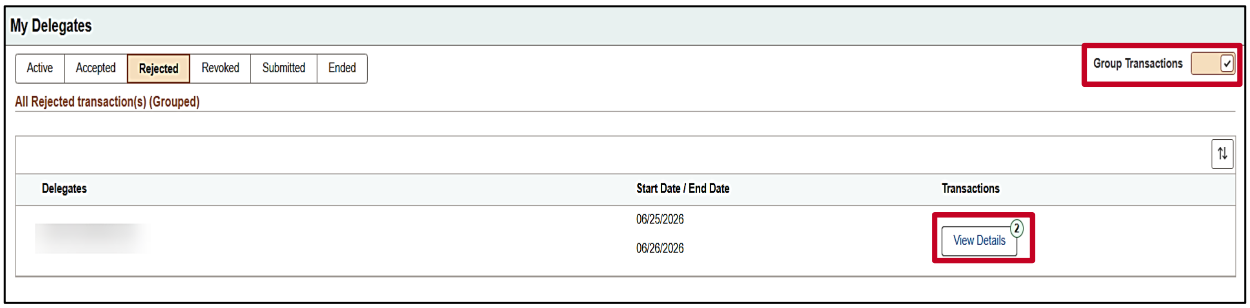
Step	Action
	The **My Delegates** page displays with the **Active** tab displayed be default. 
	Six tabs display for the Delegate: • **Active** • **Accepted** • **Rejected** • **Revoked** • **Submitted** • **Ended**
3.	Click the applicable tab to access each page to view the applicable information. See the following information sections for a breakdown of each of the six pages.
	The **Active** page displays current active accepted delegation requests. If a delegation is future dated or has ended, it will not display on this tab. 
	The **Accepted** page displays delegation requests that were sent and accepted by the Delegate. When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

The **Rejected** page displays delegation requests that were rejected by the Delegate.

When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions.

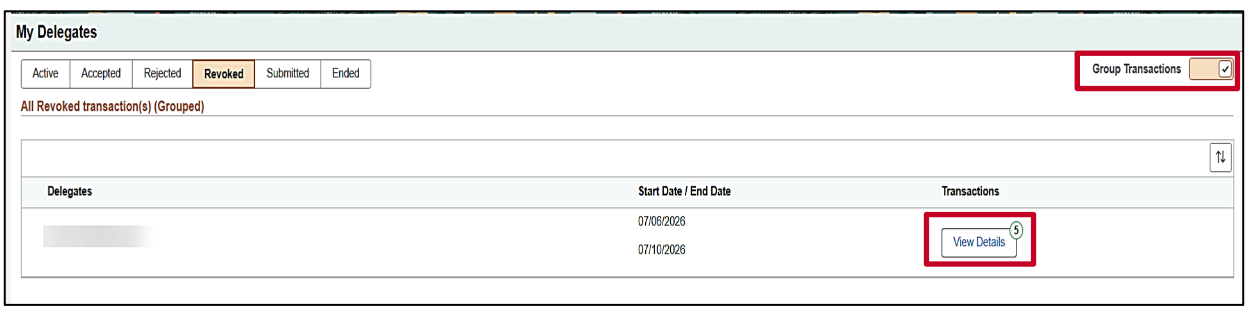
When transactions have been rejected, review and identify if another Delegate needs to be designated for the rejected transactions.



</td></tr>
<tr><td></td><td>

The **Revoked** page displays transactions that the Delegator revoked from a designated Delegate.

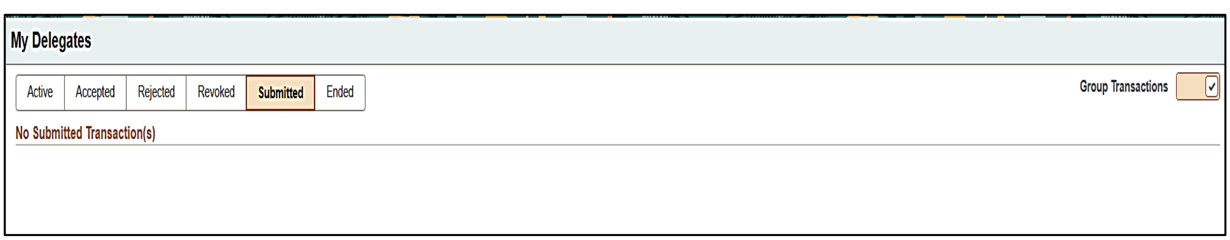
When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions.



</td></tr>
<tr><td></td><td>

The **Submitted** page displays transactions that the Delegator has delegated to a Delegate that have not been accepted or rejected.

For this scenario, there are no transactions that meet this criteria.



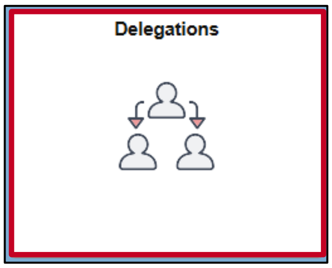
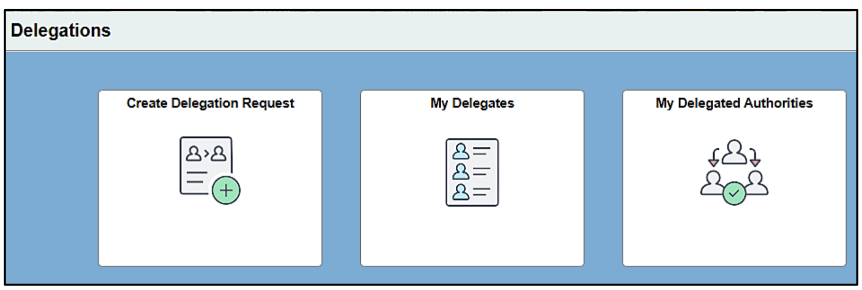
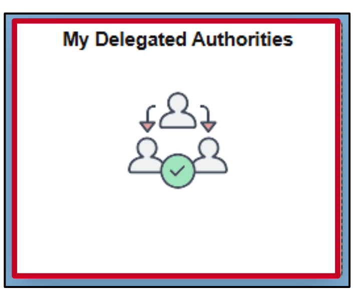
</td></tr>
</table>

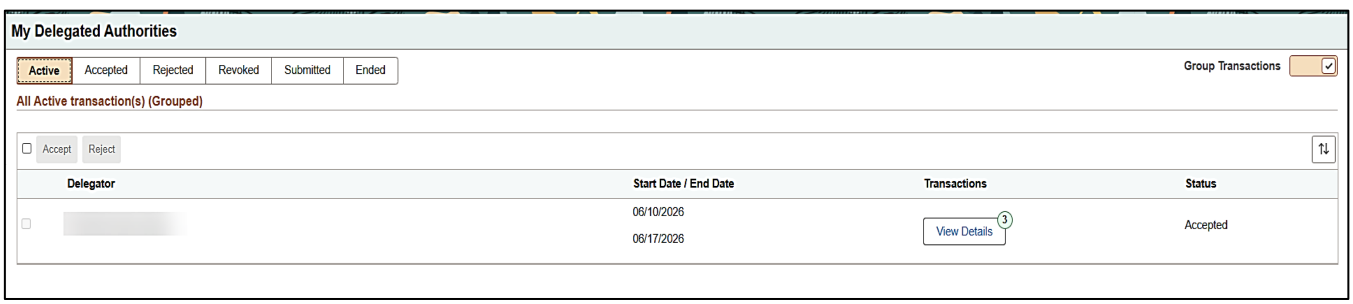
Step	Action
	The **Ended** page displays transactions the Delegator delegated, the Delegate accepted, and have now ended. For this scenario, there are no transactions that meet this criteria. 

My Delegated Authorities

The **My Delegated Authorities** tile is used by the Delegate to view transactions delegated from another approver. **My Delegated Authorities** can also be accessed through the applicable WorkCenters by clicking the **Delegation of Authority** page in the **My Approvals** section.

This section of the Job Aid will walk through the steps to access it and review the information that displays.

Step	Action
1.	Click the **Delegations** tile on the Cardinal Financials Homepage. 
The **Delegations** page displays with three tiles. 	
2.	Click the **My Delegated Authorities** tile. 

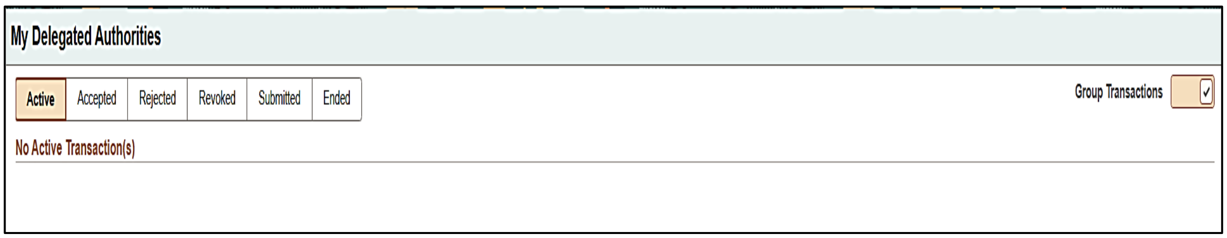
Step	Action
	Users can also access this information for their WorkCenter(s) by clicking the **Delegation of Authority** page. This page is located in the **My Approvals** section. Sample Screenshot from the **EX WorkCenter**. 
The **My Delegated Authorities** page displays. 	
	Six tabs display for the Delegate: • **Active** • **Accepted** • **Rejected** • **Revoked** • **Submitted** • **Ended**
3.	Click the applicable tab to view the information. See the following information sections for a breakdown of each of the six pages.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

The **Active** page displays current active delegation requests that the Delegate has accepted.

If a delegation is future dated or has ended, it will not display on this page.

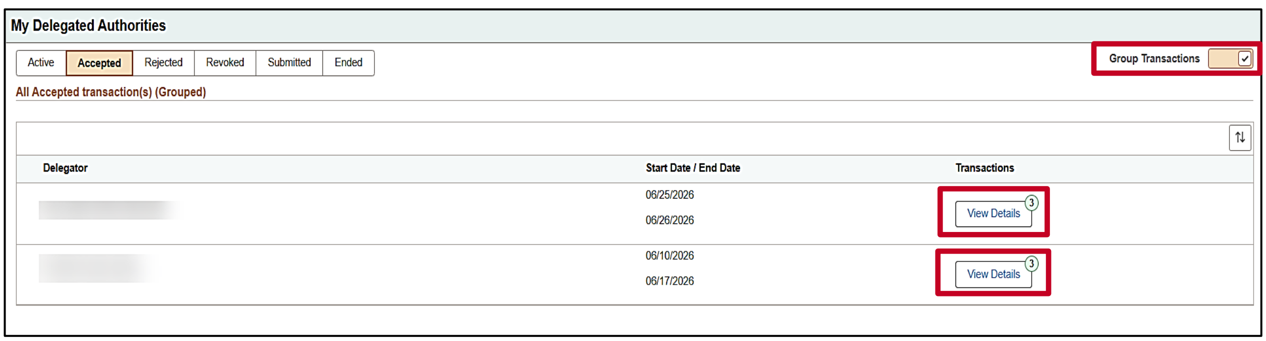
For this scenario, there are no transactions that meet this criteria.



</td></tr>
<tr><td></td><td>

The **Accepted** page displays delegation requests that were accepted by the Delegate.

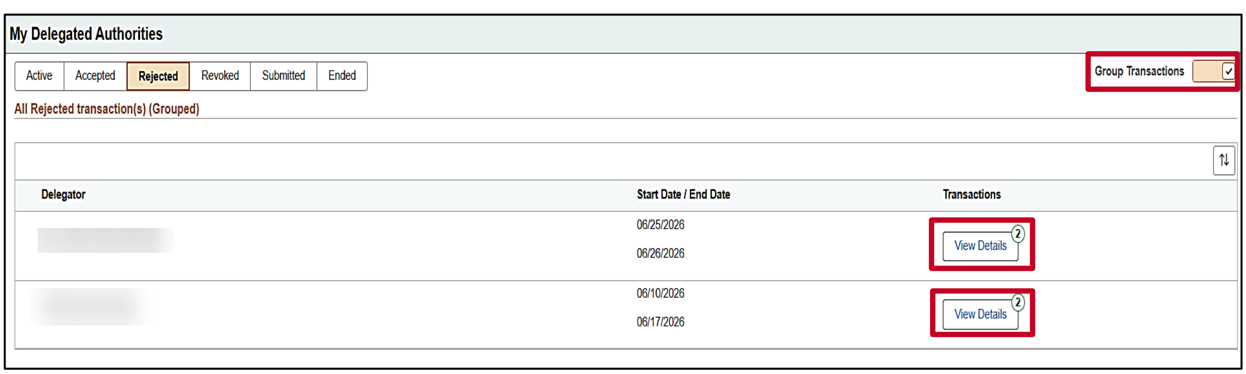
When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions.



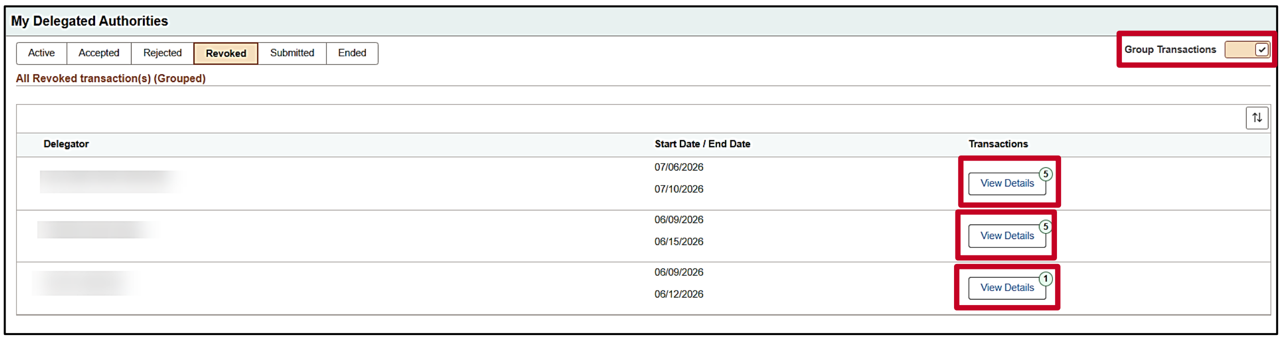
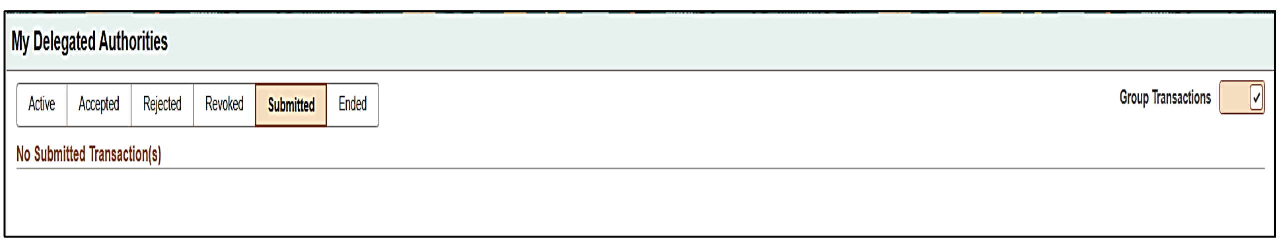
</td></tr>
<tr><td></td><td>

The **Rejected** page displays delegation requests that were rejected by the Delegate.

When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions.



</td></tr>
</table>

Step	Action
	The **Revoked** page displays transactions that the Delegator revoked from the Delegate. When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions. 
	The **Submitted** page displays transactions that the Delegator has delegated to the Delegate that have not been accepted or rejected. When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions. For this scenario, there are no transactions that meet this criteria. 
	The **Ended** page displays transactions delegated and accepted by the Delegate that have ended. When multiple transactions have been delegated, a number displays next to the **View Details** button. Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions.