



Delegation Administration for Supervisors Overview

This Job Aid provides step-by-step instructions for supervisors to manage time and absence delegations, including:

- a supervisor (delegator) to delegate and revoke transactions to/from another supervisor (delegate)
- a supervisor (delegate) to accept or reject delegation requests from a supervisor (delegator) or administrator
- a supervisor (delegator and delegate) to view the status of delegation requests.

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

Note: 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, and the delegate has pending transactions, they will remain with the delegator and will not flow to the delegate for approval. See the [TA Delegation Example](#) at the end of this Job Aid for examples of best business practice delegation.

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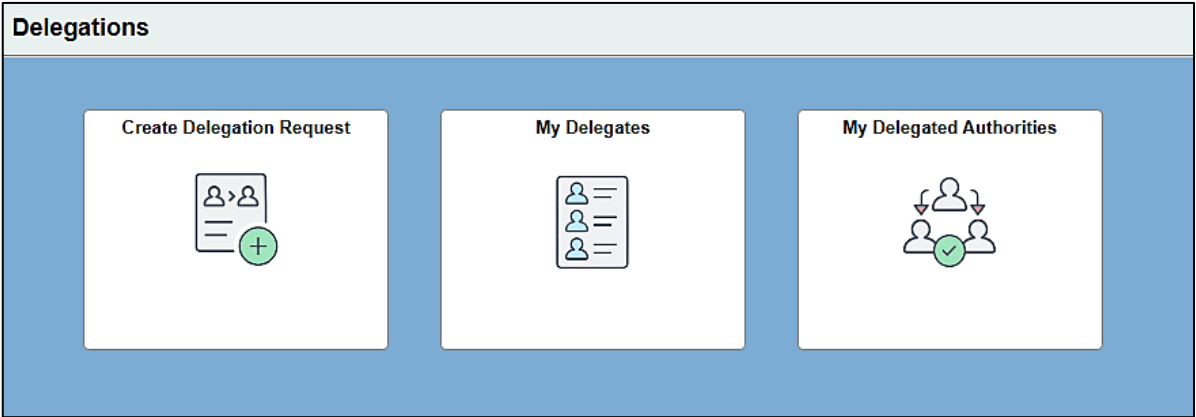
Revision History

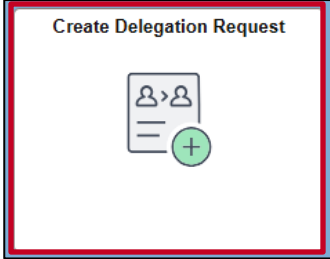
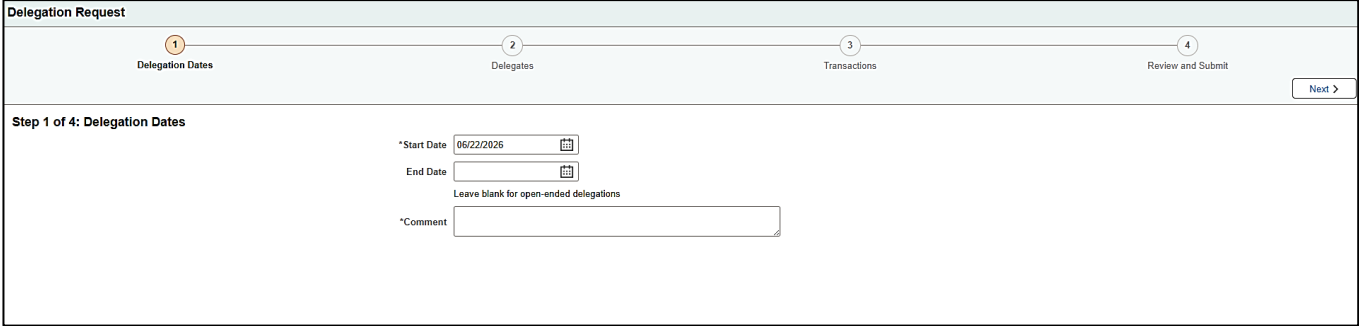
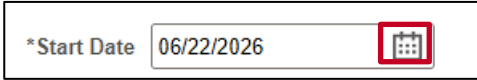
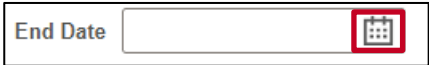
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
11/25/2025	Updated language to clarify steps related to the beginning and ending dates for Delegation Requests for an approver. In the Delegating Transactions section, steps 4 and 5.

Delegating Transactions

The following steps are used by a Reports To supervisor to delegate their transactions to a delegate 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 Delegation Request page by clicking the Delegations tile. 
The Delegations page displays. 	
	Three tiles display: • Create Delegation Request – the user can use this tile to delegate their transactions to another Reports To supervisor to manage and approve transactions on the user's behalf. • My Delegates – 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 – 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.

Step	Action
2.	Click the Create Delegation Request tile. 
The Delegation Request page displays with Step 1 of the Delegation process, Delegation Dates. 	
3.	Click the Start Date Calendar icon and select the applicable date. This is the date the delegation will begin. 
	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 that selected date, after the delegation has been accepted.
4.	Click the End Date Calendar icon and select the applicable date. This is the date the delegation will end. 
	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 7 days from the date the request was submitted, Cardinal will automatically revoke the request.



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Step	Action																																								
5.	Enter a comment in the Comment field. Note: This is a required field. *Comment Delegating to my manager while on vacation.																																								
i	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. Next >																																								
The Delegation Request page displays with Step 2 of the Delegation process. All eligible employees display for selection under the Delegates section. Delegation Request 1 Delegation Dates 2 Delegates 3 Transactions 4 Review and Submit < Previous Next > Step 2 of 4: Delegates Select All Clear All 9 rows <table><tr><th></th><th>Name 1</th><th>Email ID 1</th><th>Phone 1</th></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr><tr><td>☐</td><td></td><td></td><td></td></tr></table>			Name 1	Email ID 1	Phone 1	☐				☐				☐				☐				☐				☐				☐				☐				☐			
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i	If the delegator has multiple jobs, there will be another Step 2 where the appropriate job will need to be selected before moving forward.																																								
7.	Click the Select checkbox for the applicable delegate. Note: Multiple delegates can be selected. ☐																																								



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Step	Action
	If 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 are routed to all delegates who accept the request.
	It is never recommended to delegate down to one of the direct report employees. If this is done, and the delegate has pending transactions, they will remain with the delegator and will not flow to the delegate for approval. See the TA Delegation Example at the end of this Job Aid for examples of best business practice delegation.
8.	Click the Next button. 

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 >](#)

Step 3 of 4: Transactions

All Approve Initiate

Select All Clear All

Description %

☐ Absence Cancellation

☐ Approve Report Time Fluid

☐ Manage Approve Payable Time

☐ Manage Report Time Fluid

☐ Manager Abs Cancellation Fluid

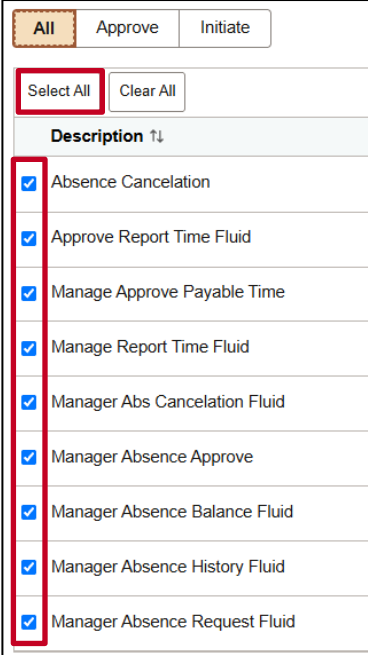
☐ Manager Absence Approve

☐ Manager Absence Balance Fluid

☐ Manager Absence History Fluid

☐ Manager Absence Request Fluid

9 rows

Step	Action
9.	Click the Select All button to select all transactions. 
	When creating Delegation Requests, it will default to All transactions. Always select all of the Transaction Types. This ensures the delegate will have access to view, manage, and approve all types of transactions. Note that available transactions are dependent on Security roles and Agency setup. 
10.	Click the Next button. 



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Step	Action
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The **Delegation Request** page displays with Step 4 of the Delegation process, **Review and Submit**. **Delegation Details** are shown.

Delegation Request

1 Delegation Dates 2 Delegates 3 Transactions 4 Review and Submit

Step 4 of 4: Review and Submit

Delegation Details

Start Date 06/22/2026
End Date 06/29/2026
Comment Delegating to my manager while on vacation.
Delegates
Transactions Absence Cancellation
Approve Report Time Fluid
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.

11.

Review the information to verify it is accurate and click the **Submit** button.

< Previous Submit

The request is submitted and the **Delegations** page redisplay.

Delegations

Create Delegation Request

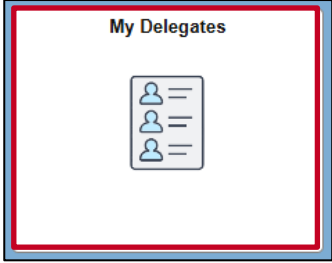
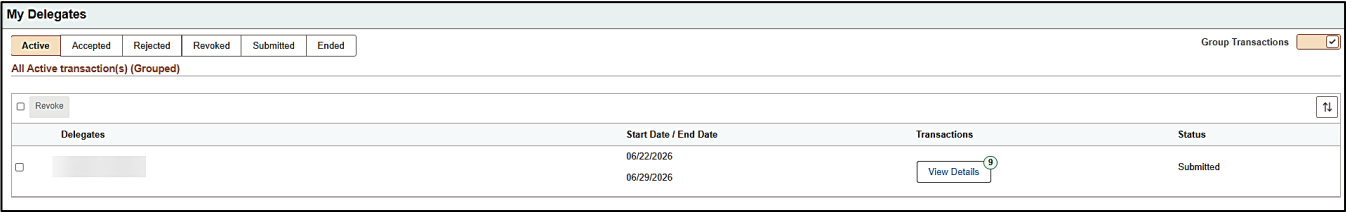
My Delegates

My Delegated Authorities



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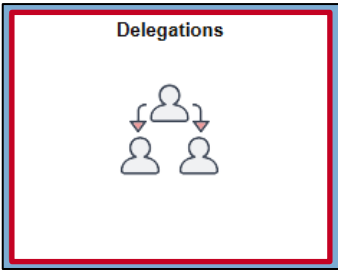
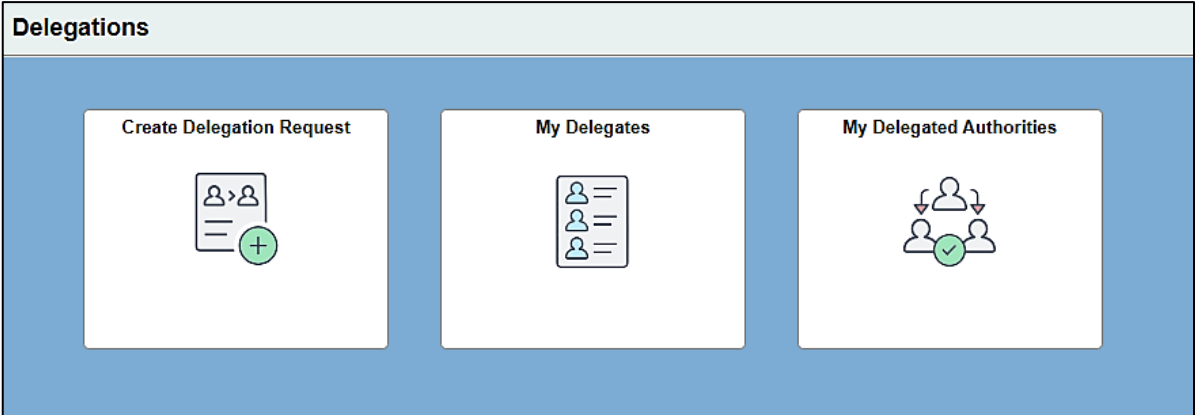
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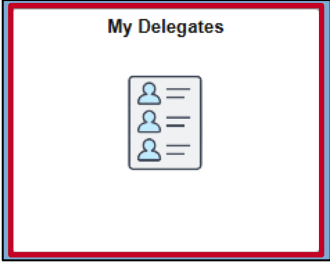
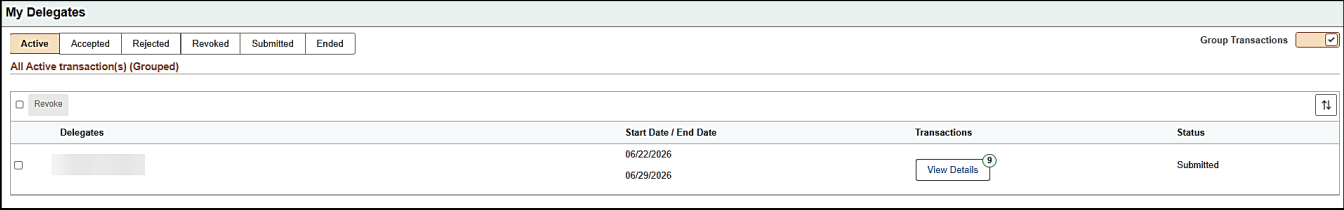
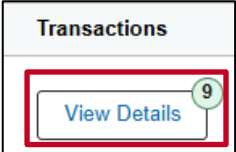
Step	Action
12.	To view the delegation, click the My Delegates tile. 
The My Delegates page will display. 	
	The delegator can view their active delegations on this page. The selected delegate/delegates will receive an email notification indicating a Delegation Request has been submitted. If a Delegation Request is not accepted or rejected within 7 days of the request, Cardinal will automatically revoke the request.

Revoking Transactions

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

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

Step	Action
1.	Navigate to the Delegation Request page by clicking the Delegations tile. 
The Delegations page displays. 	
	Three tiles display: • Create Delegation Request – the user can use this tile to delegate their Transactions to another Reports To supervisor to manage and approve transactions on the user's behalf. • My Delegates – 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 – 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. For this scenario a Delegation Request will be revoked.

Step	Action
2.	Click the My Delegates tile. 
The My Delegates page will display. 	
	Six tabs display on this page as follows: • Active • Accepted • Rejected • Revoked • Submitted • Ended For this scenario, an Active/Submitted request that has not been accepted will be revoked.
	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. 
	For this scenario, the Transaction field displays a View Details button with a count of “9”, which indicates the number of transactions submitted to that specific delegate. The delegator should revoke all transactions.
3.	Click the View Details button to see a list of transactions included in the Delegation Request. 



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

Detail

Delegator [Redacted]

Delegate [Redacted]

Start Date 06/22/2026

End Date 06/29/2026

Request Status Submitted

- Absence Cancellation
- Approve Report Time Fluid
- 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

4. Review the list of the transaction(s) included in the Delegation Request display and click the **X** icon to close the page once reviewed.



The **My Delegates** page redisplay.

Active Accepted Rejected Revoked Submitted Ended

Group Transactions ☒

All Active transaction(s) (Grouped)

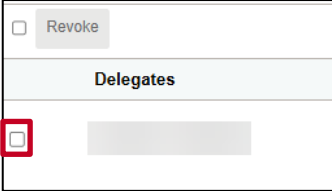
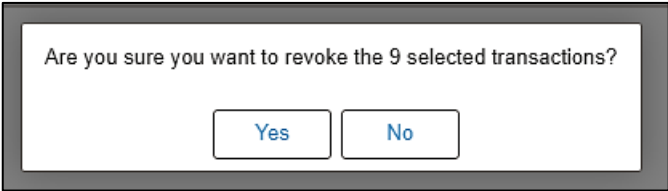
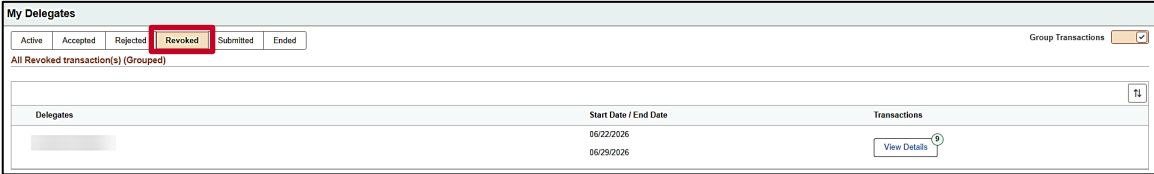
☐ Revoke

Delegates	Start Date / End Date	Transactions	Status
☒ [Redacted]	06/22/2026 06/29/2026	View Details	Submitted



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Step	Action
5.	Click the Select checkbox next to the delegate's name under the Active or Submitted tab. 
6.	Once the checkbox is selected the Revoke button will be enabled, click on the Revoke button. 
A message displays in a pop-up window confirming the delegator wants to revoke the selected transactions or all transactions. 	
7.	Click the Yes button. 
A message displays at the top of the screen that the Delegation Request is now revoked. 	
	The delegator can view all revoked transactions on the My Delegates page under the Revoked tab. 
When a delegation is revoked, it cannot be updated or changed. A new request must be created if the user wants transactions to be delegated.	



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Accepting or Rejecting a Delegation Request as a Delegate

The following steps are used to accept or reject a Delegation Request as the delegate.

There are 4 ways a delegate can accept a request:

1. Click on the email link
2. Delegation > My Delegated Authorities tile (shown here)
3. Approvals tile
4. TA WorkCenter > Approvals section

When someone delegates transactions to another user, they will receive an email notifying the user of the Delegation Request.

Delegator receives email:

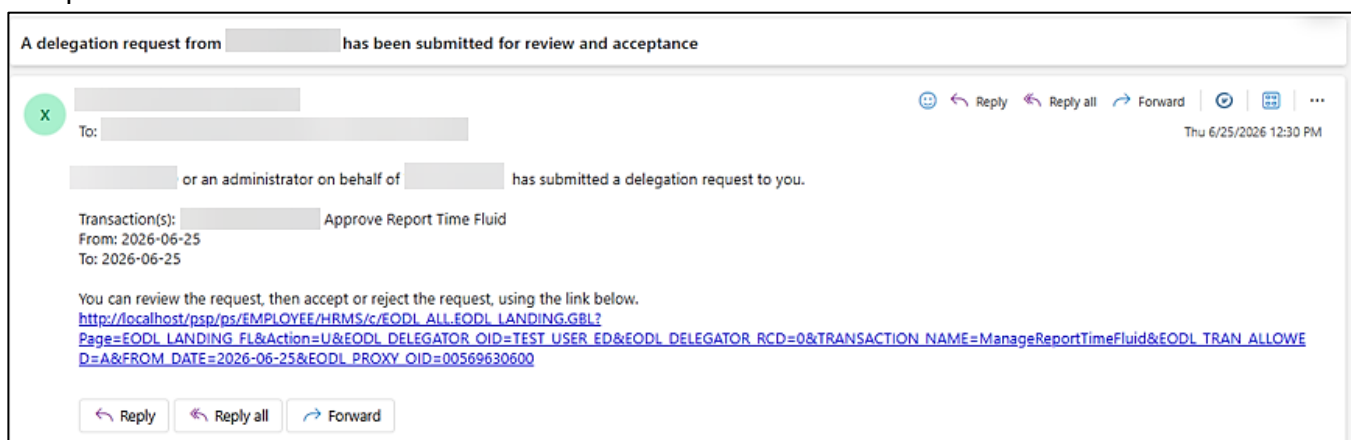
- Upon request submission
- Upon acceptance/approval

Delegate receives email:

- Upon request submission
- Upon acceptance/approval
- Upon revoking request

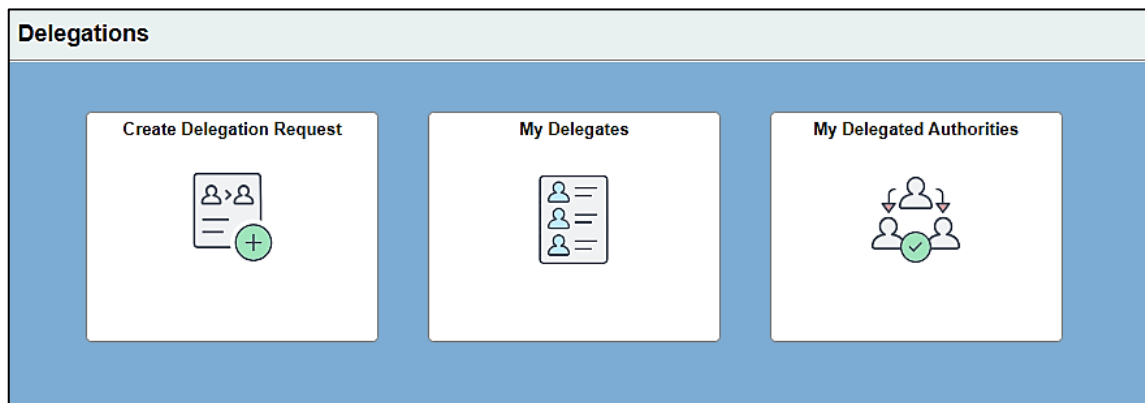
If the user is logged into Cardinal, they can also click the link in the email to access the **Delegation of Authority** page. Clicking on the link in the email will take the user to the **Delegation of Authority** page where they can accept directly on the page.

Sample email:



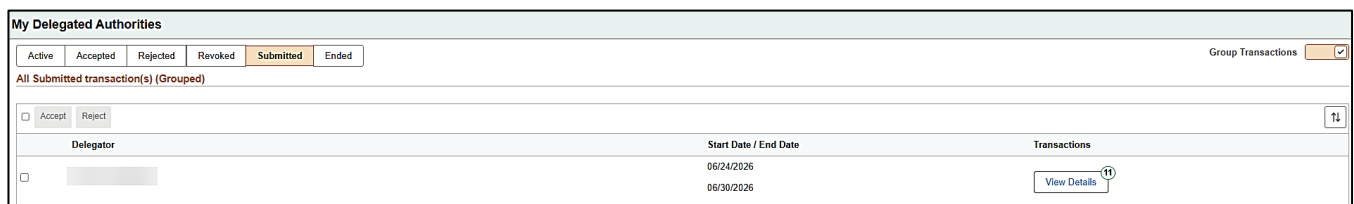
Step	Action
1.	Navigate to the Delegation Request page by clicking the Delegations tile. 
	A number displays on this tile if the user has active Delegation Request(s) / transactions that have not been accepted or rejected.

The **Delegations** page displays.



2.	Click the My Delegated Authorities tile. 
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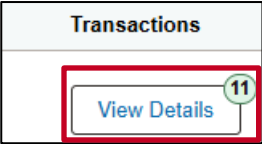
The **My Delegated Authorities** page displays.



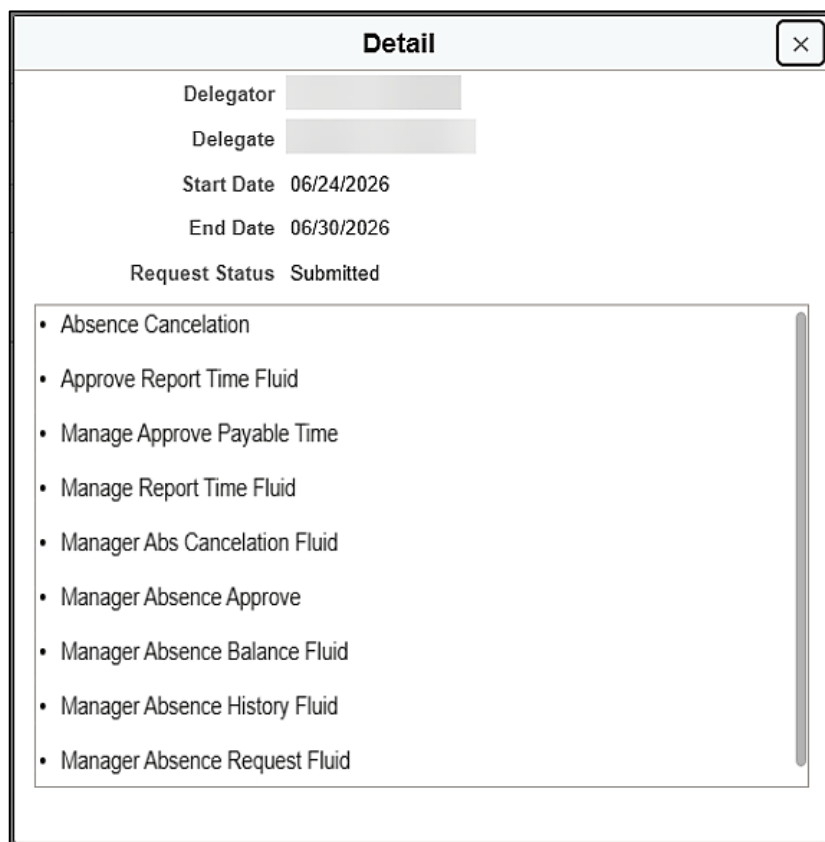


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Step	Action
	The Group Transactions toggle is selected by default, which means this page defaults with all the transactions within a request, grouped into one line. The number of transactions within the group is the number that displays next to the View Details button. Note: If the user is serving as a delegate for multiple delegators each delegation will be separated when viewing by Group Transactions. 
3.	Click the View Details button to see a list of transactions included in the Delegation Request. 
	For this scenario, the Transaction field displays a View Details button with a count of “11”. Which indicates the number of transactions submitted to this specific delegate.

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



Detail [Close]

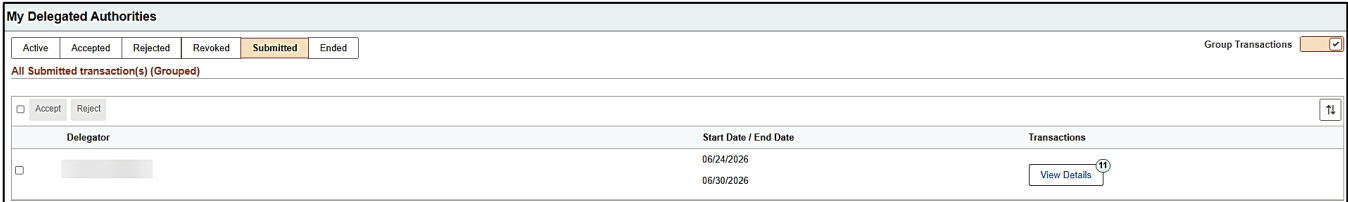
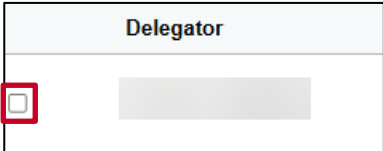
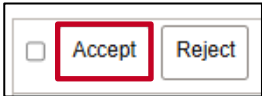
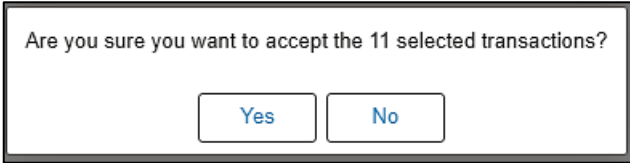
Delegator [Redacted]
Delegate [Redacted]
Start Date 06/24/2026
End Date 06/30/2026
Request Status Submitted

- Absence Cancelation
- Approve Report Time Fluid
- Manage Approve Payable Time
- Manage Report Time Fluid
- Manager Abs Cancelation Fluid
- Manager Absence Approve
- Manager Absence Balance Fluid
- Manager Absence History Fluid
- Manager Absence Request Fluid



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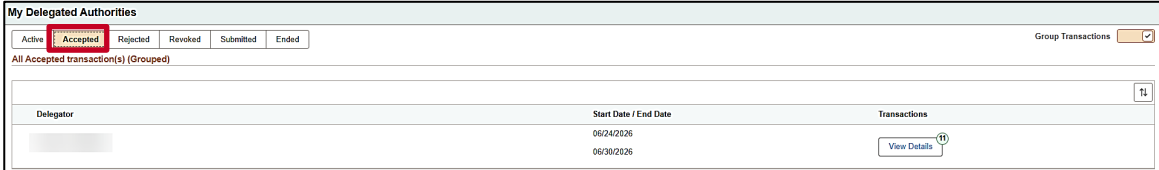
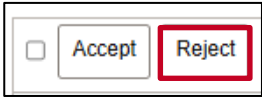
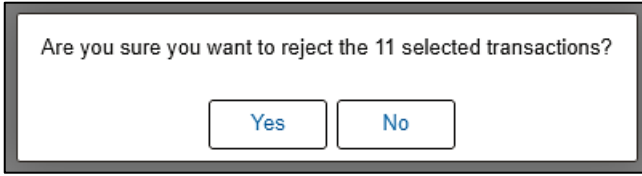
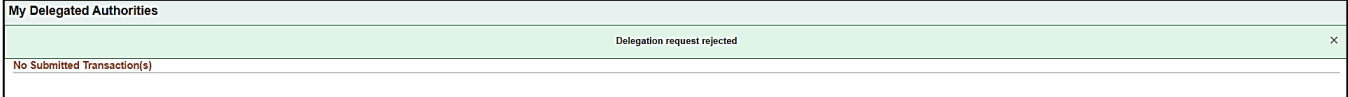
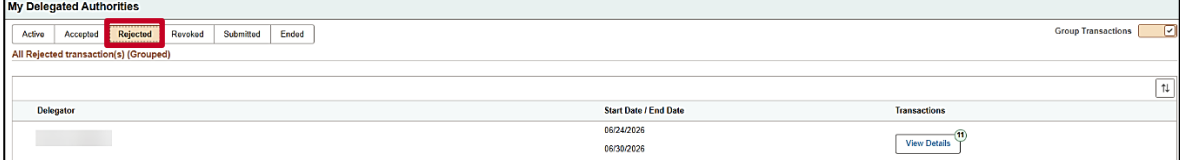
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Step	Action
4.	Review the list of the transaction(s) included in the Delegation Request display and click the X icon to close the page once reviewed. 
The My Delegated Authorities page redispays. 	
5.	Click the Select checkbox next to the delegate's name under the Active or Submitted tab. 
	To accept a Delegation Request, proceed to the next Step. To reject a Delegation Request, proceed to Step 8.
6.	Once the checkbox is selected the Accept or Reject buttons will be enabled, click on the Accept button. 
A message displays in a pop-up window confirming the delegate is accepting the delegation of the selected transactions or all transactions. 	
7.	Click the Yes button. 
	The page refreshes and the process for accepting a Delegation Request is complete.



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Step	Action
	The delegate can view all accepted transactions on the My Delegates page under the Accepted or Active tab. 
8.	Click the Reject button if the Delegation Request is not going to be accepted. 
	A message displays in a pop-up window confirming the delegate is rejecting the delegation of the selected transactions or all transactions. 
9.	Click the Yes button. 
	A message displays at the top of the screen that the Delegation Request is now rejected. 
	The page refreshes and the process for rejecting a Delegation Request is complete.
	The delegate can view all rejected transactions on the My Delegates page under the Rejected tab. 

Viewing the Status of Delegation Requests

Use these Steps to view Delegation Requests based on their current status.

There are two tiles that can be used to view Delegation Requests, which are **My Delegates** and **My Delegated Authorities**.

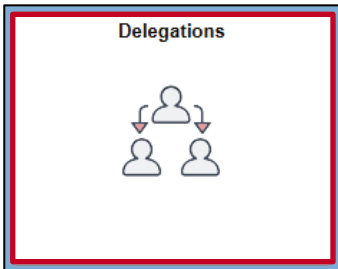
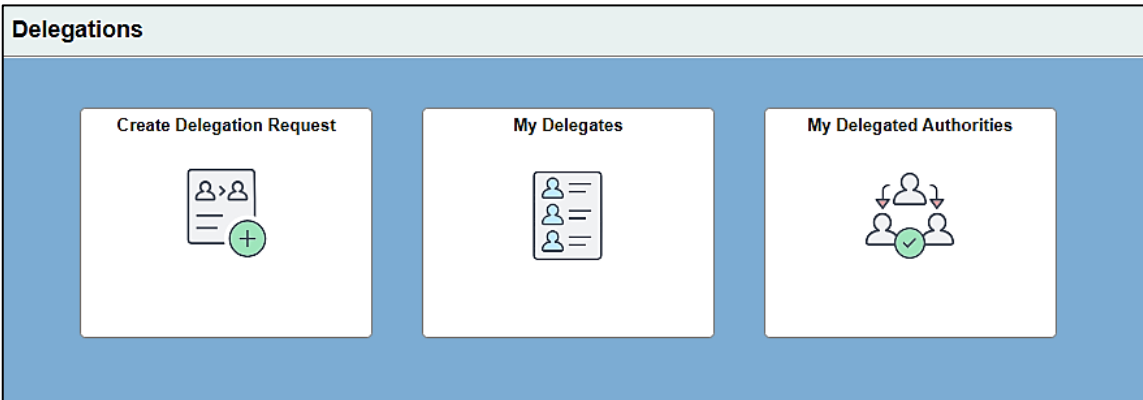
This section of the job aid will review how to access and view information for each.

My Delegates Tile

- The **My Delegates** tile is used to review all delegations that have been initiated. The user can review Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations.

My Delegated Authorities Tile

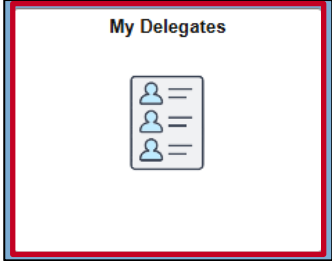
- The **My Delegated Authorities** tile is used to review all delegations where the user will serve as the delegate. The user can review their Active, Accepted, Rejected, Revoked, Submitted, and Ended delegations.

Step	Action
1.	Navigate to the Delegation Request page by clicking the Delegations tile. 
The Delegations page displays. 	

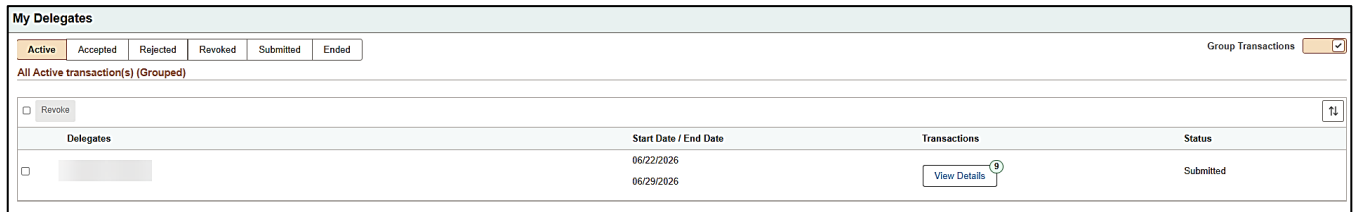


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Step	Action
3.	Click the My Delegates tile. 

The **My Delegates** page displays.



The screenshot shows the 'My Delegates' page. At the top, there are tabs: 'Active', 'Accepted', 'Rejected', 'Revoked', 'Submitted', and 'Ended'. The 'Active' tab is selected. To the right, there is a 'Group Transactions' toggle switch, which is currently turned on. Below the tabs, there is a section titled 'All Active transaction(s) (Grouped)'. On the left, there is a 'Revoke' button. The main area contains a table with the following columns: 'Delegates', 'Start Date / End Date', 'Transactions', and 'Status'. There is one row in the table with a delegate icon, the dates '06/22/2026' to '06/29/2026', a 'View Details' button with a notification badge, and the status 'Submitted'.



Six tabs display on this page:

- **Active**
- **Accepted**
- **Rejected**
- **Revoked**
- **Submitted**
- **Ended**

3.

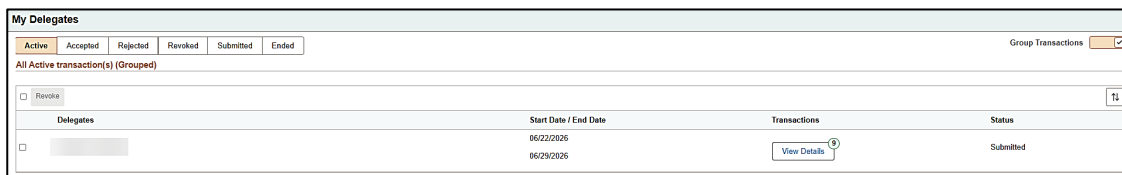
Click the applicable tab to access each page to view the applicable information.
See the following information sections for a breakdown of each of the 6 tabs.



The **Active** page displays current active accepted delegation requests.

Click the **Group Transactions** toggle or the **View Details** button to see the specific transactions.

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

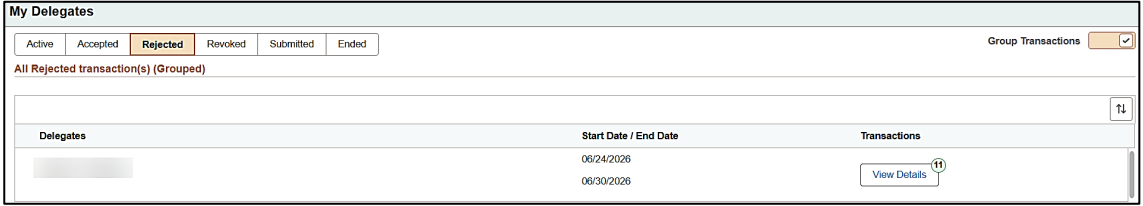
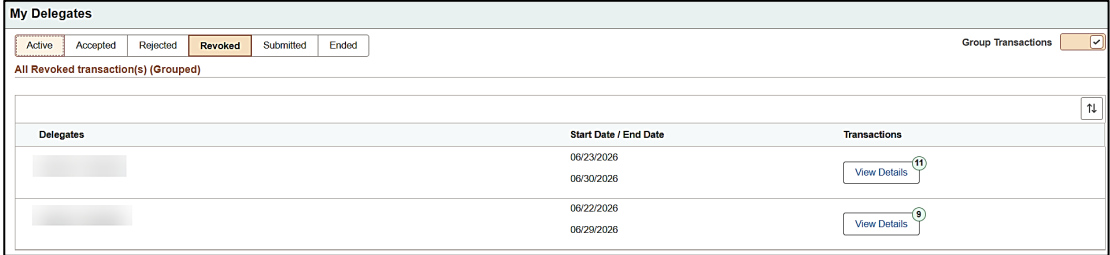
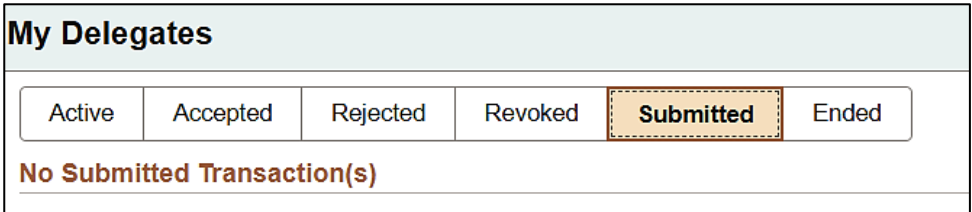


This is a duplicate of the screenshot shown in the previous section, displaying the 'My Delegates' page with the 'Active' tab selected and one transaction listed.



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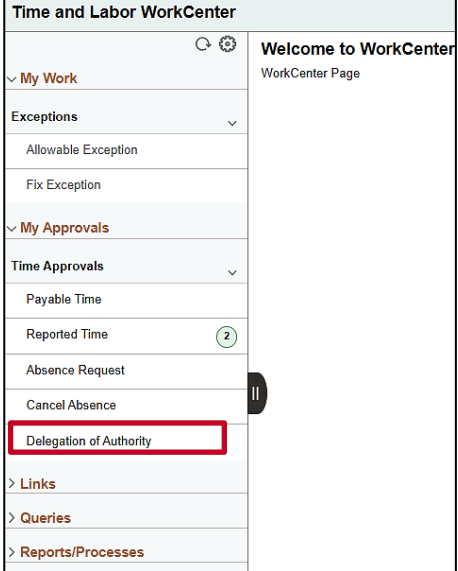
Step	Action
	The Accepted page displays delegation requests that were sent and accepted by the delegate. 
	The Rejected page displays delegation requests that were rejected by the delegate. When multiple transactions have been delegated, a number displays next to the View Details button. Click the Group 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. 
	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. 
	The Submitted page displays transactions that the user has delegated to a delegate that have not been accepted or rejected. For this scenario, there are no transactions that meet this criteria. 

Step	Action
i	The Ended page displays transactions the user delegated and were accepted by the delegate that have ended. For this scenario, there are no transactions that meet this criteria. My Delegates Active Accepted Rejected Revoked Submitted Ended No Ended Transaction(s)
i	The My Delegated Authorities tile is used by the delegate to view transactions delegated to them. This section of the job aid will walk through the information on how to access it and review the information that displays within My Delegated Authorities.
4.	Click the My Delegated Authorities tile. My Delegated Authorities
i	Six tabs display on this page with the following information for the delegate: Active – the Active tab displays current active accepted delegation requests that the delegate has accepted. Note: If a delegation is future dated or has ended, it will not display on this tab. Accepted – the Accepted tab displays delegation requests that were accepted by the delegate. Rejected – the Rejected tab displays delegation requests that were rejected by the delegate. Revoked – the Revoked tab displays transactions that the delegator revoked from the delegate. Submitted – The Submitted tab displays transactions that the user has delegated the delegate and the have not been accepted or rejected. Ended – The Ended tab displays transactions delegated and accepted by the delegate that have ended. My Delegated Authorities Active Accepted Rejected Revoked Submitted Ended



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Step	Action
	The delegate can also approve and accept delegation requests as the delegate and view the Delegation of Authority within the TA WorkCenter tile. Use the following navigation path in the WorkCenter: My Approvals > Time Approvals > Delegation of Authority 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.



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TA Delegation Example (Best Business Practice)

