

TA372_Delegation Administration

Delegation Administration Overview

Delegation Administrators are able to create, modify, and revoke Delegation Requests on behalf of TL Supervisors and Absence Management (AM) Supervisors (i.e., Approvers). This delegation functionality is used when the Approver has an unplanned absence and therefore, is unable to approve Timesheets/Absence requests and did not delegate them to another Approver prior to going out of office.

The Delegation Administrator can delegate to any agency TL Supervisor/AM Supervisor as a proxy. It is important to delegate all applicable transaction types to the proxy when assigning delegation. Delegation Administrators should follow agency guidelines regarding the delegation of approvals to ensure adequate internal controls are enforced.

Delegated transactions cannot be re-delegated by a TL Supervisor, AM Supervisor, or HR Administrator. Only a Delegation Administrator can re-delegate.

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

Note: It is never recommended to delegate down to one of the supervisor's direct report employees. If this is done, that employee will have the ability to approve their own time or absences as well as the time and absences for all of that supervisor's other direct report employees. Self-approval of time and absences is strongly discouraged and is not a best business practice. See the <u>TA</u> <u>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.

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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (<u>Section 1</u> , after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.



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Adding a Delegation Request

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 Add Delegation Request page using the following path:
	NavBar > Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

The Add Delegation Request Search page displays.

← Tea	m Time Add Delegation Request
Add D Find a Sear	elegation Request an Existing Value ch Criteria ty information you have and click Search. Leave fields blank for a list of all values.
1	Recent Searches Choose from recent searches
	Empl ID begins with Q Empl Record = Name begins with Q Last Name begins with Q Clear Clear
1	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the Employee ID for the person being delegated on behalf of in the Empl ID field. Note : When completing this field, enter the Supervisor's (person whose Worklist is being delegated on behalf of) Employee ID. Empl ID begins with
3.	Click the Search button.



Step	Actio	on							
The Add	d Deleg	gation Re	quest pag	ge displays.					
Add D	elegation F	Request							
			Employee	Emplid		Empl Reco	rd 0		
Add Del	egation Requ	est							
From Da	te	To Date	Trans Type	Transaction Name		Proxy	Name		
08/31/20	20 🛄	08/31/2020	Approve		۹	٩		+ -	
Maintain Save	Return t	o Search Notify	Administer Delegatio	on					
4.	Enter This i From 08/31	r/select the is the date Date /2020	e applicab e the deleg	le from date for the regation will begin.	eque	st using the	From Date C	alendar icol	n.
i	If trar items	nsactions s will be av	need to be ailable fo	e approved immediat r the proxy to approve	ely, e e onc	nter/select e the proxy	the current dat accepts the d	te. All pend elegation.	ing
5.	Enter the d To Da	r/select the de ate the de nte	e applicab legation v	le to date for the required in the required to the To	uest u o Dat	using the T o e field blan	Date Calend k for ongoing c	l ar icon. Th delegation.	is is
6.	Click	the Trans	saction N	ame Look Up icon.					
	Transa	action Name		٩					



Step	Action							
The Loo	k Up Transad	tion Name p	bage displays in	a pop-up	window.			
			Look Up Tran	saction Nam	le	×		
						Help		
		Cancel]					
		Transactions						
		□ , Q		4	1-9 of 9 💟	▶ ▶I		
		Transactions		Transaction Typ	e			
		Employee Absen	ce Balance Fluid	Initiate				
		Employee Absen	ce History Fluid	Initiate				
		Employee Absen	ce Request Fluid	Initiate				
		Manage Approve	Reported Time	Approve				
		Manage Reported	1 Time	Initiate				
		Manager Absence	e Balance Fluid	Initiate				
		Manager Absence	e History	Initiate				
		Manager Absence	e History Fluid	Initiate				
		Manager Absence	e Request Fluid	Initiate				
7.	Select the ap	plicable tran	saction type to	delegate	by clicking	the corres	ponding li	nk in the
	Transaction	s column.			-			
	Transactions		Transaction Type					
	Employee Absence B	alance Fluid	Inifiate					
The Add	Delegation I	Request pag	e returns with th	ne selecte	d Transac	tion Name		
Ad	d Delegation Request							
		Employee	Emplid		Empl Reco	ord 0		
Fro	n Date To Date	Trans Type	Transaction Name		Ргоху	Name		
08/	31/2020	Approve	TL_MSS_EE_SRCH_PRD	٩	<u>ا م</u>		+	-
Mair	ave Return to Search	Administer Delegati Notify	on					



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Step	Action
8.	Click the Proxy Look Up icon.
	Proxy

The **Look Up Proxy** page displays in a pop-up window. All employees for all Agencies display in this list.

list.							
			Add [elegation Requ	est		4
			I	Look Up Proxy		×	
		Empl ID	begins with			Help ,	
		First Name	begins with				
		Last Name	begins with 🔽				
		Search	Clear Can	Cel Basic Lookup			
		Search Results	\$				
		Only the first 3	00 results of a poss	ible 225871 can be dis	olayed.		
		View 100		II. ∢	1-300 of 300 🔽 🕨	M	
		Empl ID	First Name	Last Name	Name		
						·	
				_			
		-		_			
		-					
		-					
		-					
9.	Select or search f	or the ap	plicable e	mployee wit	nin the deleg	jator's	Agency by Employee ID or
	Name.						
	Empl ID begins with						
	First Name begins with						
	Last Name begins with			J			



Ste	p Actio	on							
	The	employee s	elected sh	nould either:					
	•	Have the the	e TL Supe gator (Rep	rvisor role in Cardina ports To) in Cardinal I	I HCI HCM	M and have	the same direc	t supervisor a	ЗS
		or							
ĺ	•	Be the d	irect supe	rvisor of the person b	being	delegated	for		
	It is r If this well appr See pract	ever recon s is done, th as the time oval of time the <u>TA Dele</u> ice delegat	nmended nat employ and abse and abse egation Ex ion.	to delegate down to o yee will have the abili nces for all of that su ences is strongly disc <u>cample</u> at the end of t	one o ity to pervi ourao this J	f the super approve the sor's other ged and is r ob Aid for e	visor's direct rep eir own time or a direct report em not a best busine xamples of best	ort employee bsences as ployees. Self ss practice. business	≥s. f-
The	Add Dele	gation Rec	uest page	e redisplays with the	selec	ted Proxy.			
	Add Delegatio	n Request							
	Add Delegation D		Employee	Emplid		Empl Reco	rd 0		
	From Date	To Date	Trans Type	Transaction Name		Ргоху	Name		
	08/31/2020	08/31/2020	Approve	TL_MSS_EE_SRCH_PRD	۹	٩		+ -	
	Maintain Delegated J Save Retu	n to Search Notify	Administer Delegati	on					
10.	To co icon	ontinue to a	add delega	ation items for additio	nal tr	ansaction ty	ypes, click the A	dd a New Ro	ow
	Prox	,	Name						
		٩	1	+					
ĺ	Repe	eat Steps 4 v).	- 9 until a	II applicable transact	ion ty	pes have b	een added (sam	ple screensh	not
	Add D	elegation Request	Employee	Emplid		Empl Record	i O		
	Add Dele From Da	e To Date	Trans Type	Transaction Name		Proxy Na	ne		
	09/01/20	09/03/2020	Approve	TL_SRCH_APPRV_GRP	Q	Q		+ -	
	09/01/20	09/03/2020	Approve	TL_MSS_EE_SRCH_PRD	۹	٩		+ -	
	09/01/20	09/03/2020	Initiate	TL_MSS_EE_SRCH_PRD	۹	٩		+ -	
	09/01/20	09/03/2020	Initiate	GP_ABS_MGRSS_BAL	۹	Q		+ -	
	Maintain I Save	Return to Search	Administer Deleg	jation					
]	



Step	Action
11.	After all transaction types have been added, click the Save button.
j	The delegation is not active until the proxy accepts it. The proxy can find instructions for accepting the delegation in the Job Aid titled TA373_Delegation Administration for Supervisors . This Job Aid is located on the Cardinal Website in Job Aids under Learning .



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Administering Delegation

The Delegation Administrator can see all delegation activities including delegations initiated by supervisors. Use the **Administer Delegation** page to view, reassign, and revoke delegations, as well as view past delegations. The selection criteria allow various views.

Step	Action
1.	Navigate to the Administer Delegation page using the following path:
	NavBar > Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Administer Delegation

The Administer Delegation page displays.

nister Delegation			Maintain Delegated Authorities Add Delegation Request
ion Criteria			
Delegator	٩	From Date	
Proxy	Q	To Date	
Transaction Name	Q	Request Status	~
		Delegation Status	~
		Search	Clear

Below is a description of the search criteria fields:

- **Delegator**: Enter/select the person for whom the TA transactions belong (Reports To)
- Proxy: 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"



Step	Action					
2.	Enter the applicable search criteria to sea any of the search criteria fields.	earch for a dele From Date To Date Request Status Delegation Status	gation (or group of	of delegations) using		
3.	Click the Search button.					
The searc default.	h results display in the bottom portion of t	he page. The	Delegation Requ	u est tab displays by		
	Administer Delegation		Maintain Delegated Authorities Add Delegation Request			

Administe	r Delegation				Maintain Delegated Authorities Add Delegation Request	
Selection C	riteria					
	Delegator	Q	From Date	09/01/2020		
	Proxy	Q	To Date	09/03/2020		
Т	ransaction Name	Q	Request Status	~		
			Delegation Status			
			Search	Clear		
Search Resu	lts					
Delegation	n Request <u>R</u> equest Details	III				
	Description	Delegator	Name	Proxy	Name	
	Manager Absence Balance			(
	Manage Approve Reported Time					
	Manage Reported Time					
	Manage Approve Payable Time					
Selec	t All Dese	ect All	Revoke		· //	
]
4. Click the	e Request Det	ails tab to	review addit	ional inform	mation for the Delegation	Requests.
Search De	eulte		_		-	
Search Re	Suits	uget Details				
Delega	uon kequest Req	uest Details				



Step	Action						
The Request Details tab displays.							
	Administer Delegation Maintain Delegated Authorities Add Delegation Request]		
	Selection Cr	iteria					
	Delegator Q From Date 09/01/2020						
	Proxy		٩	To Date	09/03/2020		
	Tr	ansaction Name	۵	Request Status			
				Search	Clear		
	Search Resul	ts Request Request	Details >				
		From Date	To Date	Request Status	Delegation Status	Notify Delegator	
		09/01/2020	09/03/2020	Submitted	Active		
		09/01/2020	09/03/2020	Submitted	Active		
		09/01/2020	09/03/2020	Submitted	Active		
		09/01/2020	09/03/2020	Submitted	Active		
	Select	tAII	Deselect All	Revoke			
5.	To revo corresp	ke delegate onding Sel	ed items, sel ect checkbo	ect the applica x option(s).	ble Delegatior	Request(s) by clicki	ng the
		00.00.00000					
		09/01/2020					
	09/01/2020						
		09/01/2020					
i	The Select All button can be used to select all of the Delegation Requests simultaneously.						
	Se	Hect All					
6.	Click th	e Revoke l	outton.				
	De	eselect All	Revoke				



Step	Action
j	Delegations do not need to be revoked if an end date was populated and the delegation is not being removed prior to that date. The delegation will automatically expire on the end date and any remaining pending items will be returned to the Reports To Approver.
	To reassign delegated items:
	Revoke the original delegated items by following Step 5 above.
	Add a new delegation by following the steps in the <u>Adding a Delegation Request</u> section of this Job Aid.



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TA Delegation Example (Best Business Practice)

Lee can delegate to sid (his direct supervisor), and to Cheryl (who reports to his same supervisor). Both have the required TL Supervisor role*.

Paul can delegate to Lee (his direct supervisor) who has the required TL Supervisor role^{*}. Paul cannot delegate to Jill because she does not "Report To" Paul's supervisor Lee.

Karen can delegate to Paul (her direct supervisor) or to Bill (her coworker that reports to her same supervisor, Paul). Both have the required TL Supervisor role*. Note, that while Bill does not serve as anyone's Cardinal Reports To position, he was given the TL Supervisor role* so he could assist with timesheet and absence approvals when Karen is out of the office.

Bill has no direct reports. As a result, he will not have approval notifications to delegate to anyone. But because he was given the T&L Supervisor role, he will have security to approve TA transactions delegated to him by Karen.



Cheryl can delegate to **sid** (her direct supervisor), and to **Lee** (who reports to her same supervisor). Both have the required TL Supervisor role*.

Jill can delegate to Cheryl (her direct supervisor) who has the required TL Supervisor role*. Even though Bob reports to Jill's supervisor (Cheryl), she cannot delegate to him because he does not have the TL Supervisor role*.

Bob has no direct reports. As a result, he will not have approval notifications to delegate to anyone. But Bob does have the Delegation Administrator role which allows him to delegate approval notifications from any user to any other user with the TL Supervisor role* (e.g., when Sid is out, Bob could delegate Sid's approval notifications to Paul).

Tom can only delegate to Jill (his direct supervisor) who has the TL Supervisor role^{*}. He cannot delegate to Linda because she does not have the TL Supervisor role^{*}.

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