Administrator Delegating Another Employee Worklist Overview

This document provides the step-by-step instructions used to delegate the Worklist from one employee (Approver) to another (Proxy Approver).

Note: this functionality is only available to employees who have the Delegator security role.
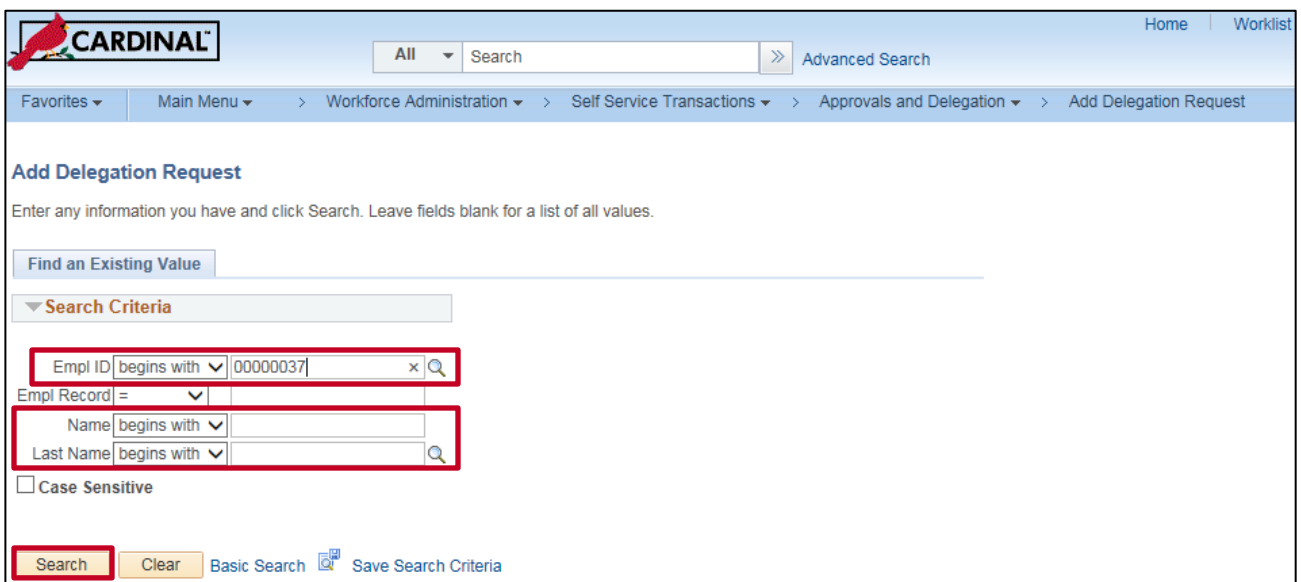

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Delegating An Employee's Worklist

1. Sign into Cardinal and access **Cardinal HCM**.

2. Navigate to the **Add Delegate Request** page using the following path:

   Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

3. The **Add Delegation Request** page displays.

4. Enter the **Empl ID** of the person that you need to delegate the work from, if unknown, you can search by using **Name** (first name) or **Last Name**.

5. Click the **Search** button.

6. If more than one employee meets the criteria entered, the **Search Results** section displays at the bottom of the page. You can select the employee from this list by clicking the **Empl ID** link.

7. Enter the **From Date**. If transactions need to be approved right away, populate the **From Date** field with the current date.

8. Enter the **To Date**. This is the date the delegation should end.
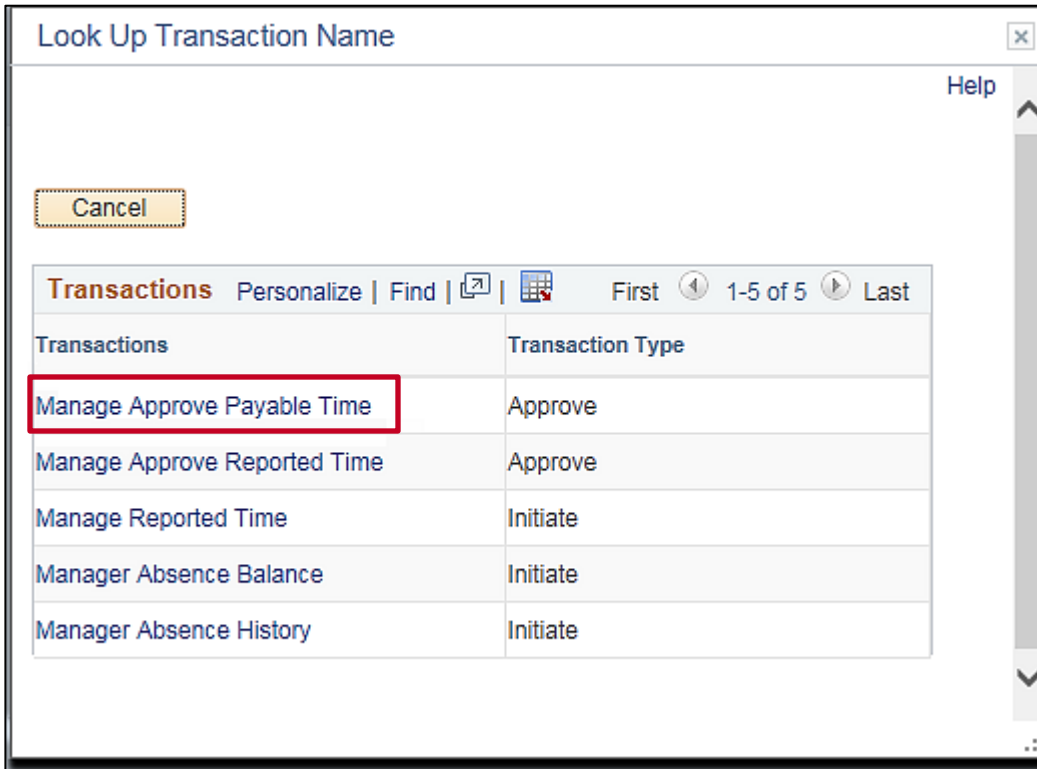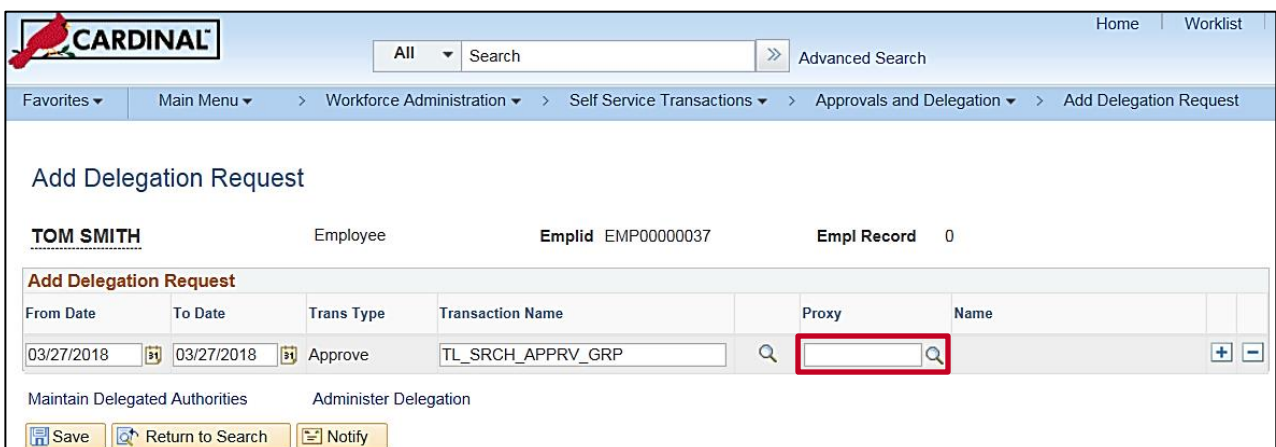
9. Select **Transaction Name** by clicking the lookup button.

10. The **Look Up Transactions Name** list displays.

11. Click the **Transaction** (e.g., **Manage Approve Payable Time**) from the list. Typically, you should add all transactions to delegate.

12. Enter the Employee ID in the **Proxy** field of the person you are delegating the transaction(s) to. Make sure the person you are delegating to has the Approver role. It is recommended that you delegate to a peer or an approver above you, not to a subordinate that reports to you even if this person has the approver role. This will avoid a circular workflow issue with your own time, which you cannot approve.

13. Click on the plus sign (**+**) to add another row if you want to delegate additional transactions and repeat steps 9 -12 until you have added all the desired transactions. Typically, you should add all transactions to delegate.

14. Click the **Save** button.

15. Once you click the **Save** button an email is generated and sent to the proxy as well as to the employee you are delegating the worklist from. The delegation request also displays as a worklist item on the **Worklist** of the proxy.