

## Road Map for The Delegate Drop Down Menus

You can set your Action List preferences to show the Primary delegation menu. You only see this menu when **BOTH** of the following conditions exist:

- You are a Fiscal Officer on an account where a Primary Delegate has been identified
- An e-doc using this account needs to be approved by the Primary Delegate

### The options in the Choose Primary Delegate menu:

**Choose Primary Delegate:** Is not really an option at all, it's the label of the drop down menu. When this text is visible you are looking at your own action list and will only see e-docs that have routed directly to you for action.

**Specific Name:** Your Primary Delegates are listed by name. When you choose a name from this menu, you are looking at this Primary Delegate's Action List. You will see only the e-docs that you have the authority to approve as the Fiscal Officer.

**All:** This is the list of all the Primary Delegates that have been identified for your accounts. When you choose **All**, you are looking at the Action Lists of all your Primary Delegates at once. You will see only the e-docs that you have the authority to approve as the Fiscal Officer.

You can set your Action List preferences to show the Secondary delegation menu. You only see this menu when **BOTH** of the following conditions exist:

- You have been identified as a Secondary Delegate for an account
- An e-doc using this account needs to be approved

### The options in the Choose Secondary Delegate menu:

**Choose Secondary Delegation:** Is not really an option at all, it's the label of the drop down menu. When this text is visible you are looking at your own action list and will only see e-docs that have routed directly to you for action.

**Specific name:** The Fiscal Officers you have been chosen to be a Secondary Delegate for are listed by name. When you choose a name from this menu, you are looking at the all the e-docs that you could approve for this Fiscal Officer.

**All:** This is the list of all the Fiscal Officers you have been chosen to be a Secondary Delegate for. When you choose **All**, you are looking at all the e-docs that you could approve for all the Fiscal Officers.