FA-FM-BO Delegation QRG

Short-term delegations for the Business Office staff are handled differently when an area has been deployed into the new workflow.

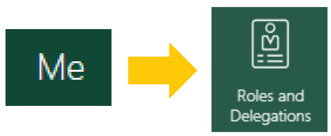
*If your area has **NOT** deployed yet, follow the **Vacation Period Approver Assignment** instructions on page 2 of the Delegation Type Fact Sheet found in Guided Learning and on the Ignite website.*

Key Points to consider:

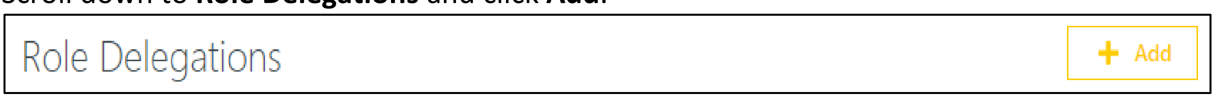
- Each Role in the dropdown menu needs to be set up.
  - One per department
- Items started, but not submitted before the delegation start date will not follow the workflow.
- Delegated items must be "claimed" to process the transaction.
- Delegations should only be lateral or upward – never down.
  - ✓ FA to FA, FA to FM, FA to BO, FM to FM, FM to BO, BO to BO
  - ✗ NOT FM to FA, BO to FM, BO to FA
  - Discuss with your Business Officer if a delegation needs to be made outside the unit.

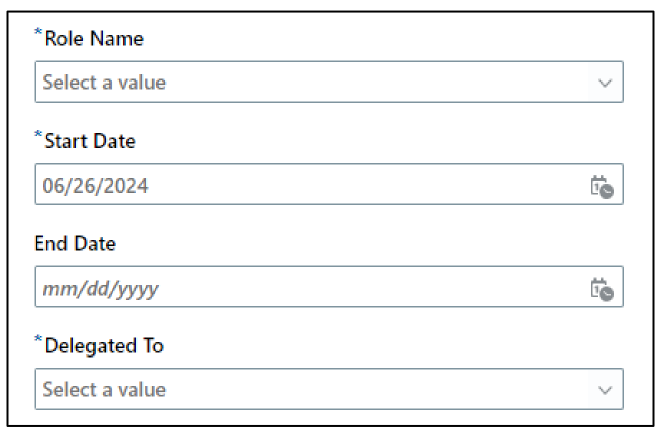
Instructions:

1. From the Ignite Homepage, click the **Me** tab, and then select the **Roles & Delegations** tile.



2. Scroll down to **Role Delegations** and click **Add**.





3. Select a **Role Name** from the dropdown menu.
   a. If multiple roles are listed, you <u>must</u> enter a delegation for each role.
4. Enter a **Start Date & End Date** – you are strongly advised to start the delegation 1 day before you leave.
5. In the **Delegated To** field, start typing the name of the person you want as your delegate. Select the person's name when it appears.
6. Click **Save**.
7. Repeat the above steps for all Roles in the dropdown menu.

*Note: The **Approval Delegations** section found <u>below</u> the Role Delegations section relates only to the HCM module, so **no action** is needed in that section.*

July 2, 2024

Baylor University