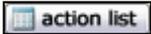




Viewing Items in the Action List as a Primary or Secondary Delegate

Navigation: KFS > Main Menu > Action List

Step	Action
1.	Click the action list button. 
2.	There are two types of delegates that can be established: primary and secondary .
3.	Documents route directly to the Primary Delegate's action list . The eDocs do not appear in the Fiscal Officer's action list . Note: A Fiscal Officer may apply a special filter to their action list allowing them to view the documents routed to the Primary Delegate .
4.	The Delegator field displays the name of the person who delegated the authority to you.
5.	Secondary delegates do not automatically see the documents in their action list , eDocs do not automatically route directly to the Secondary Delegates' action list. Instead, Secondary Delegates and must apply a special filter to their action list to see the document routed to them on behalf of the Fiscal Officer . Note: This box will only appear when you have an item to act on as a Secondary Delegate .
6.	Click the drop-down arrow button. 
7.	When applying the Secondary Delegate view, you have two choices: All Secondary Delegation option and the individual Delegator .
8.	The All Secondary Delegation option allows you to view all documents routed to you as a secondary delegate regardless of who the delegator is.
9.	If you were listed as a secondary delegate for more than one account, you would see multiple Fiscal Officers' names if you had items to take action on.
10.	Select the All Secondary Delegations option from the drop-down menu. 
11.	The All Secondary Delegations view will show you all the items you have to take action on as a secondary delegate .

Step	Action
12.	Click the drop-down arrow button. 
13.	Click (Name) from the drop-down menu list.
14.	The Individual Name view will show you the document(s) that are in your action list as a secondary delegator for that individual. Review the document and take the appropriate action. Note: If you had multiple names listed in the drop-down menu you would select each person separately to view the action items for that individual.
15.	To clear the filter, you need to select the Choose Secondary Delegation option from the drop-down menu. Note: You may also clear the filter by selecting the Clear Filter button next to the drop-down menu.
16.	To learn more about taking actions on eDocs in you action list please view the <i>Acting on Items in the Action List</i> job aid document.