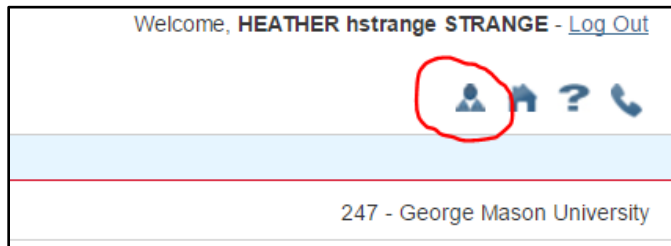


Delegating Approval Authority in BofA Works

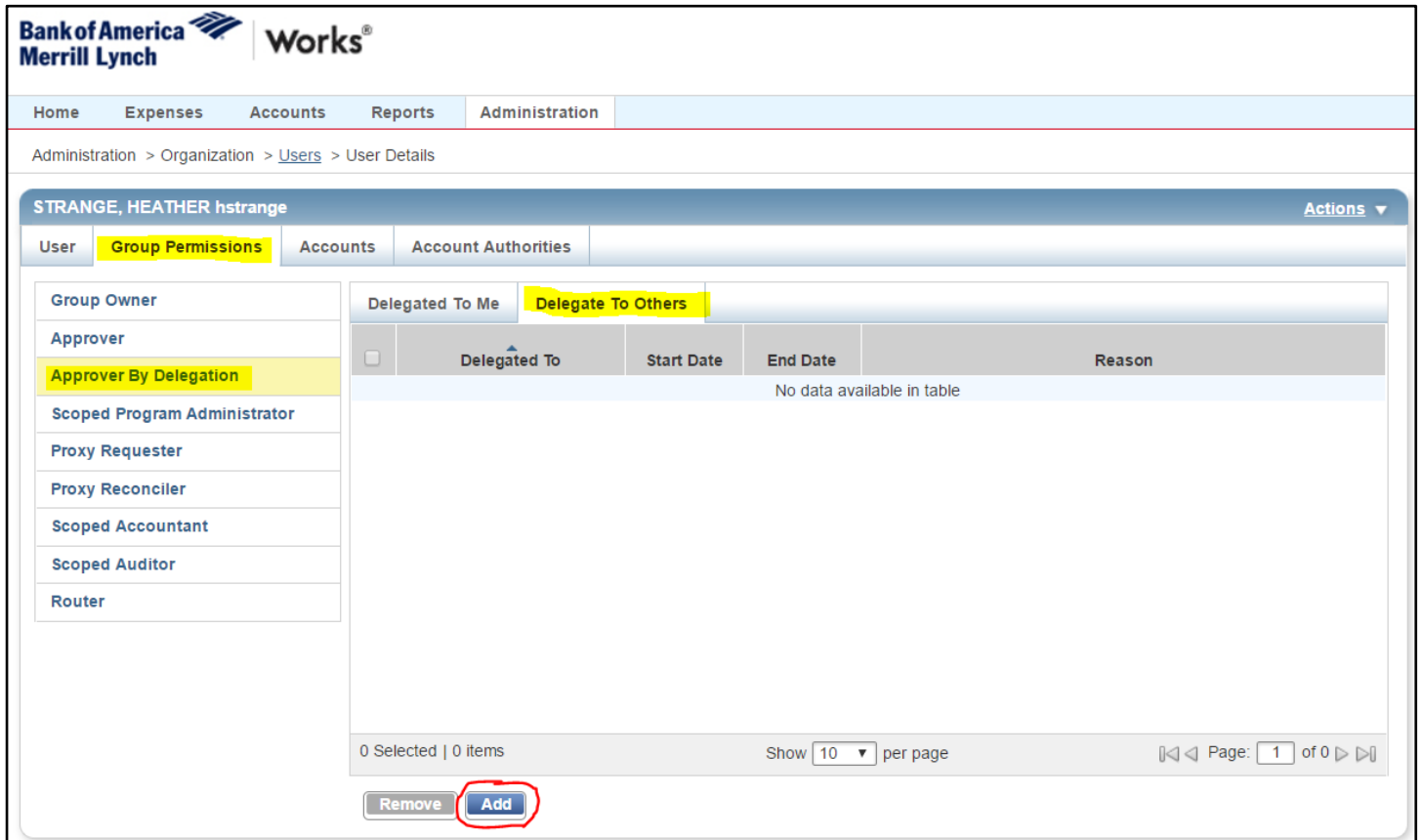
When an approver is out of the office or otherwise unavailable to approve P-Card transactions in Works, he/she should delegate approval authority to a colleague within the unit who is not the P-Cardholder. This delegation is critical due to the monthly P-Card allocation and approval deadlines. Once the approver processes the electronic delegation in Works the FAST team and the P-Card Administrator will complete the delegation process in Banner Finance.

Step-by-Step

1. Login to [Bank of America Works](#).
2. On the far right select the “My Profile” icon



3. Select “Group Permissions,” then “Approver by Delegation,” then “Delegate to Others” and click “Add.”



Bank of America
Merrill Lynch | Works®

Home Expenses Accounts Reports Administration

Administration > Organization > Users > User Details

STRANGE, HEATHER hstrange Actions

User Group Permissions Accounts Account Authorities

Group Owner

Approver

Approver By Delegation

Scoped Program Administrator

Proxy Requester

Proxy Reconciler

Scoped Accountant

Scoped Auditor

Router

Delegated To Me Delegate To Others

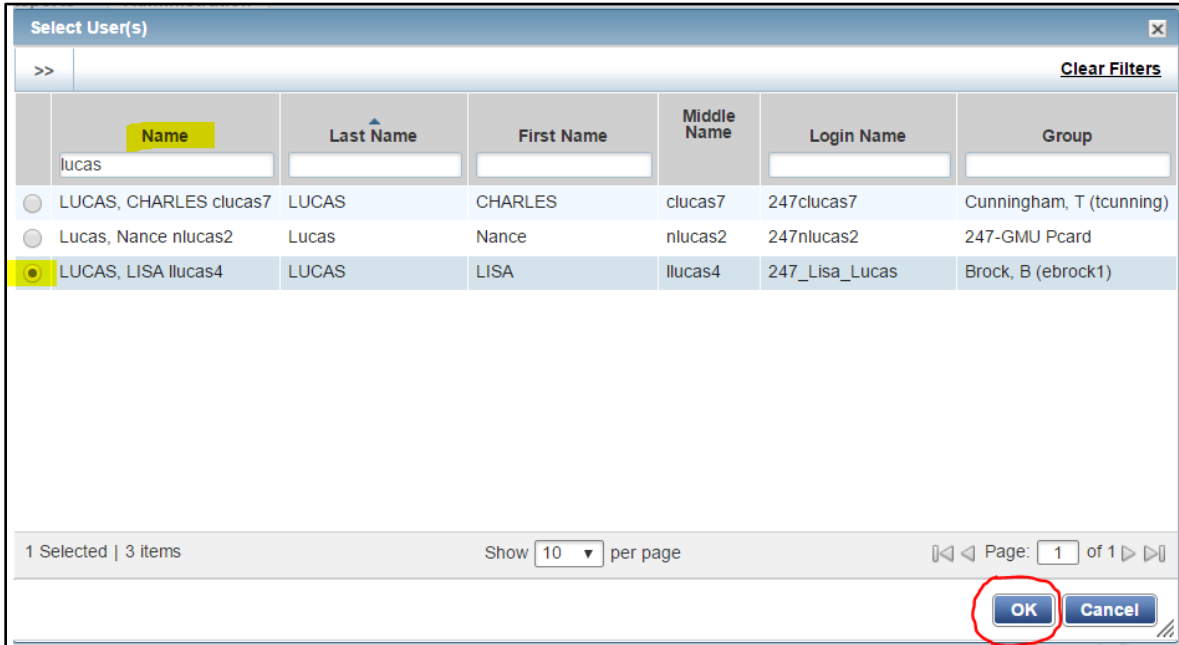
<input type="checkbox"/>	Delegated To	Start Date	End Date	Reason
No data available in table				

0 Selected | 0 items Show 10 per page Page: 1 of 0

Remove Add

4. Search for the employee by name; select the person by clicking the button next to their name and then click “OK.”

Delegating Approval Authority in BofA Works

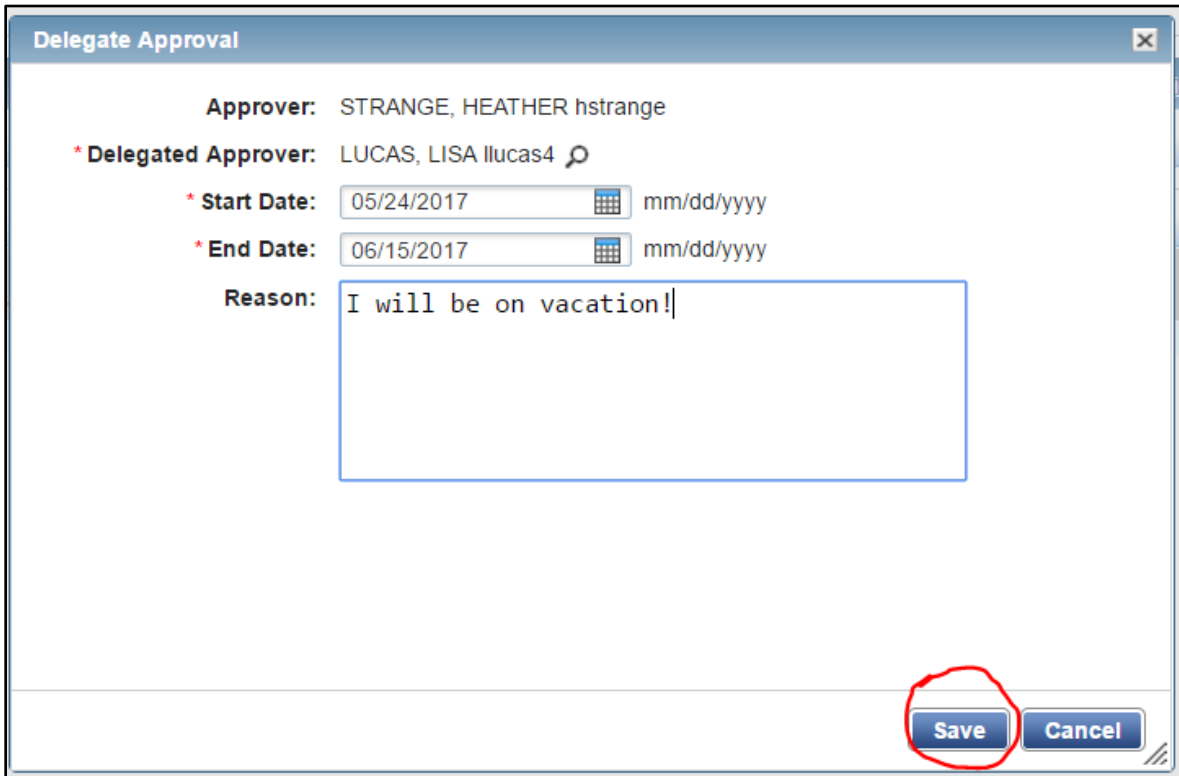


	Name	Last Name	First Name	Middle Name	Login Name	Group
<input type="radio"/>	LUCAS, CHARLES clucas7	LUCAS	CHARLES	clucas7	247clucas7	Cunningham, T (tcunning)
<input type="radio"/>	Lucas, Nance nlucas2	Lucas	Nance	nlucas2	247nlucas2	247-GMU Pcard
<input checked="" type="radio"/>	LUCAS, LISA llucas4	LUCAS	LISA	llucas4	247_Lisa_Lucas	Brock, B (ebrook1)

1 Selected | 3 items Show 10 per page Page: 1 of 1

OK **Cancel**

5. Enter the start/end date for the delegated approval. Enter the Reason and click "Save."



Approver: STRANGE, HEATHER hstrange

*** Delegated Approver:** LUCAS, LISA llucas4

*** Start Date:** 05/24/2017 mm/dd/yyyy

*** End Date:** 06/15/2017 mm/dd/yyyy

Reason: I will be on vacation!

Save **Cancel**

6. The individual will now appear on the "Delegate to Others" tab. Users may log out of BofA Works. The FAST team and P-Card Administrator will update Banner Finance.