Getting Started: Acting As a Delegate

Once the delegator has <u>set up the delegation</u>, the delegate can now take actions. In order to act as the delegator, the delegate must:

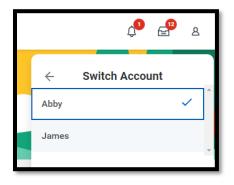
Click on the **Profile** icon. 1. Select Switch Account. 2. **_1 12** 8 Q Abby View Profile <u>ہ</u> Home My Account > 8 Workbench 88 Favorites ☆ 0 My Reports ? Documentation Z > ÷ Switch Account Ð Recovery Assistant > Sign Out



Remember that Delegation is **different** than <u>Matrix</u> <u>Management</u> and Administrative Support Security.

This job aid only covers Delegation.

3. Select the name of the delegator to act on behalf of:





If the **Switch Account** option isn't available, try closing your browser entirely and then go back into Workday.

- 4. The delegation dashboard will appear. This displays only the reports and tasks the delegate has access to.
- Depending on the access <u>established by the delegator</u>, the delegate may also select the inbox icon to take action on some items in the delegator's inbox.

On behalf of: James			
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Delegation Dashboard			
	Delegated Actions		\$
	Category	Reports & Tasks	
	Job Change	Change Job	

For more information, refer to the job aid(s) specific to the transaction type you need to process. Job aids available at our <u>Workday Training</u> site.

Geisinger