Workday Job Aid
Acting as a Delegate

Use this job aid to execute tasks delegated to you by your peer.

To learn more about Workday, find job aids and videos at http://workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website.
Review Your Delegated Tasks

1. Log into Workday
2. Click the **Inbox** worklet

3. Click **Switch Account**
Review Your Delegated Tasks

4. A notice will display indicating you are about to switch accounts

5. Click **OK**

6. Click the cloud in the upper right corner of the screen

7. Click **Inbox**

8. When the inbox of the person who delegated tasks to you displays, review the information to be acted on or approved, and click **Approve**
Review Your Delegated Tasks

End of Process
Acting as a Delegate — Check Process Status

**Process Steps**

1. Log in to Workday
2. Click the **cloud icon** and then click **Notifications**

3. From the Workday Delegated Tasks Update notification *(left side)*, click **View Entire Delegation Inbox** *(right side)*

**HINT:** Status of task is mentioned here.
Acting as a Delegate — Check Process Status

Process Steps (continued)

4. Click the tab to see the details

WHAT IS THIS?
- Tasks: View the current actions you can take as the delegate
- Process Status: View the status of processes you have initiated as the delegate
- Notifications: View notifications of delegation requests
- Delegation Settings: View all tasks that have been delegated to you

HINT: Click the View button on any tab to see more information or to change the settings on the view (e.g., show unread only, show a date range).