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## 1. Document Control

### 1.1 Change Log

The change log and approvals tables below refer to updates to the original User Guide developed by Worktribe. This guide is based on the Worktribe Users’ Guide and has been tailored to reflect the University of Aberdeen system.

<table>
<thead>
<tr>
<th>Version updated</th>
<th>Date</th>
<th>Updates</th>
<th>Change made by</th>
</tr>
</thead>
<tbody>
<tr>
<td>19-01-29a-cr</td>
<td>29 Jan 2019</td>
<td>First adjusted version based on final Jul2018 document</td>
<td>C Rouault</td>
</tr>
<tr>
<td>19-08-08a-cr</td>
<td>8 Aug 2019</td>
<td>Updated for Jul19 release</td>
<td>C Rouault</td>
</tr>
<tr>
<td>19-08-27a-dw</td>
<td>27 Aug 2019</td>
<td>Reviewed with adjustments</td>
<td>D Weatherall</td>
</tr>
<tr>
<td>19-08-29a-cr</td>
<td>29 Aug 2019</td>
<td>Adjustments accepted</td>
<td>C Rouault</td>
</tr>
<tr>
<td>19-09-03a-cr</td>
<td>3 Sept 2019</td>
<td>Added footer</td>
<td>C Rouault</td>
</tr>
<tr>
<td>20-01-28a-ah</td>
<td>28 Jan 2020</td>
<td>Revised for Jan20</td>
<td>Ali Hudson</td>
</tr>
<tr>
<td>20-01-31a-jlm</td>
<td>31 Jan 2020</td>
<td>Reviewed</td>
<td>J Miller</td>
</tr>
<tr>
<td>20-01-26a-ah</td>
<td>26 Jun 2020</td>
<td>Revised for Jul20</td>
<td>Ali Hudson</td>
</tr>
</tbody>
</table>

### 1.2 Approvals

<table>
<thead>
<tr>
<th>Version</th>
<th>Approved by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
2. Introduction

This general guidance document summarises common activities that you may use in Worktribe. For example: searching, viewing a record and editing a record.

2.1 How to Use This Guide

This guide provides a general overview of how Worktribe systems appear and how to use them. Documentation on functions specific to particular products such as Worktribe Research or Worktribe Curriculum is separate. Administrator-only functions are also documented separately.

2.1.1 Iconography used in this guide

The following icons have been used throughout the guide to highlight information.

- Notes, and reminder hints.
- You may need to check your internal processes to confirm specifics of how your institution is using the system.
3. Login/Logout

To Login:

Go to https://uoa.worktribe.com

Enter your University username and password then select Login.

Once logged in, you will remain so for the duration of your browser session.

To Logout:

There is no need to log out – simply close your browser tab or window. You will be prompted to login again at the start of a new browser session.
4. The Header and Menu Bar

At the top of every Worktribe page are two bars, which are visible at the top of all Worktribe pages:

- the black **Header Bar** gives you the ability to quickly search for records in the system, create and access custom ‘Saved’ searches, and edit your profile; and
- the dark blue **Menu Bar** allows you to navigate around the other sections of Worktribe using ‘drop down’ menus

### 4.1 Header Bar

The Header bar contains three elements:

- The **Worktribe Logo**, clicking on which returns you to your **Home Page**;
- The **Quick Search** (the dark grey text box in the centre of the Header Bar);
- Your Name, moving your mouse over which displays the **User Menu**

#### 4.1.1 Quick Search

In the centre of the **Header Bar** is the **Quick Search** which allows you to quickly find many records within the system. More details on **Searching** are provided in a separate section later in this document.
4.1.2 User Menu

Putting the cursor on your name leads to the User Menu being displayed, as shown above. This menu gives you access to view your Profile and to view archived records.

4.2 Menu Bar

The Menu Bar lists the core sections of the Worktribe system. The specific menu items are detailed in the product-specific documentation. What you see will depend on the user role assigned to you in the system.
5. Home Page

The **Home Page** displays a personal view of the system, giving you access to any records within the system that you are assigned to you, that you are following, or have accessed recently.

The Home Page is split into two sections:

- The **'Notification Sidebar'**, unique to the Home page, gives you a scrollable listing of recently updated records, alerting you to recent events and comments of interest to you. Updated records will appear if:
  - they are assigned to you
  - they have mentioned you in the past
  - you have decided to follow the record

- The **'Dashboard'** which gives you an overview of records relevant to you within the system.

You can return to this view at any time by clicking the Home menu item on the far left of the blue Menu Bar.
5.1 Notification Sidebar and Notification Overview

5.1.1 Notifications

Notifications within the Worktribe system alert you and others to record changes, updates and comments.

For example, Worktribe products use workflow to drive activity throughout the lifecycle of a Project or the development of a Programme. At each stage of the workflow, notifications are automatically sent to the relevant users based on their involvement in that stage (for example to inform you that you need to approve something).

When you receive notifications that mention you directly, you will see a red marker badge next to Home on the Menu Bar detailing the number of direct notifications you have received. In addition, on your Home Page a numbered red badge will appear against any records that have a direct notification.

By default, you will also receive direct notification via email.

5.1.2 The Notification Sidebar

The Notification Sidebar displays the last 100 records which have recently been commented on or have been recently modified. They are displayed in the following order:

- **Unread Direct Notifications**
  
  Comments that directly mention you, you have been assigned to in the past, or which you have been directly notified about. Within this group items are ordered by number of direct notifications, then newest to oldest. These are listed in bold with a numbered red badge next to them. The higher the number, the more direct notifications you have received.

- **Records Manually Marked Unread**
  
  Notifications which you have marked as Unread using Mark Unread at the top of the notifications overview page for that record. These records will have a blank (i.e. unnumbered) red badge.
• **Unread Indirect Notifications**

Comment threads listed in bold that have mentioned you in the past, or about which you have received a badged notification in the past, ordered newest to oldest.

• **Recent Events**

Records in the system which you have manually followed, records you have recently read, or that your administrator has automatically set for you to follow but have already read, ordered newest to oldest.

Selecting a record in the sidebar displays in the **Dashboard** area the **Notification Overview** for that record.

### 5.1.3 Notification Overview

The **Notification Overview** is a notification-focused view of a record, showing its current workflow status, who it currently is assigned to and the comment thread. You can navigate to the full record by selecting **View Details** either at the bottom of the comment thread or in the top right. Here you may also select **Mark Unread**.

If you have permission to, you also have the ability to comment on the record. Adding a comment will also mark the notification as read, meaning that it will no longer appear as an unread notification in your sidebar until more notifications arrive or you manually mark it as unread.

For more information on using comments, see the separate section on **Comments** later in this document.
5.2 Dashboard

The **Dashboard** is visible on the right-hand side when visiting the Home Page and is an overview of records relevant to you within Worktribe. For ease of viewing, each type of information is presented on its own tab. For example, in the screenshot above, the contents of the **Recent** tab are being displayed.

Examples of content you can find on the Dashboard include:

- **Latest Announcements**  
  System-wide announcements made by administrators to users of Worktribe

- **Recent**  
  Records you have recently accessed within Worktribe

- **Records Assigned To Me and My Records**  
  A tab is displayed for each type of record (Project, Output, Programme, etc) where there are records that are either assigned to you or created by you and still having an active status

- **Saved Searches**  
  Advanced searches you have saved
6. Basic Navigation

6.1 Menus

Menus give you access to everything you need to manage the different records available within Worktribe. For example, the Projects menu will give you access to My Projects, Assigned to Me, Create Project, and more.

Administrators have an additional Admin menu option. This gives access to add or amend supporting data, such as Organisations.
7. Record Management

7.1 Forms

Worktribe uses forms to create or amend record details. Forms overlay the main screen.

Forms include fields with drop down pick lists, autocomplete lookups and date pickers as well as free-text fields. Some fields may be pre-populated, based on your user credentials and Org¹ Unit.

To close a form without saving changes, click the red X at the top right of the form.

If changes have been made, the system will check if you want to **Exit without saving changes?**

7.1.1 Drop down Lists

Fields that contain a list of options to choose from will have a down arrow to the right of the field, as in the example below. Click in the field to display a list of options, as shown below for the Other Org Units field.

¹ The Org Unit will be the Cost Centre that the applicant is linked to in the Human Resources system. Examples of Org Units are Other Applied Health Sciences, Applied Medicine, HSRU, Chemistry and Economics.
Scroll through the list, or enter some text as shown below, to reduce the options before making your selection.

System administrators manage the lists of values for drop-down lists like this.

### 7.1.2 Mandatory Fields

In the system any field with an * (asterisk) by its name is a mandatory field. You must complete these fields.

The workflow determines when fields become mandatory. Worktribe performs real-time validation of mandatory fields. Note the icon in the screenshot below, which appears when you try to save a blank field which is mandatory. You cannot progress whilst mandatory fields are incomplete.

As valid values are entered, the system displays confirmation to the right of the field.

### 7.1.3 Editing and Deleting

There is more than one way you can choose to edit or delete a record, which will depend on your permissions and the type of record. Apart from occasions when the display provides you with an explicit *Edit* button, the following icons may be shown alongside records displayed in a list. If you can see these icons, here is what they mean:

- When you see the *edit* icon (the pencil icon), you can select it to open the record for editing. If the pencil is greyed out the record is not available for editing.

- When you see the *delete* icon (red cross) you can select it to delete the record.

- Sometimes, when viewing a record, your permissions will allow the display of the grey *Edit* button. Select it to open the record details for editing.
7.1.4 Additional Information/field prompts

Some fields include additional explanations to help you, as shown below:

7.1.5 Percentages

Where the system refers to figures being in percentages, when entering the figures, you do not need to add the % symbol.

7.2 Actions

Whenever you see the button this means there is a list of actions you can do with the information on the screen.

The options are permissions based, so not all the options listed below may be available to you.

Actions available when viewing a list of items:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>Enables users with the relevant permissions to export data from the system, typically in a form which can be imported into other applications such as Microsoft Excel.</td>
</tr>
<tr>
<td>Select ...</td>
<td>Enables the selection of one or more item before performing a follow on action.</td>
</tr>
<tr>
<td>Select All</td>
<td>Selects all items before performing a follow on action.</td>
</tr>
<tr>
<td>Select None</td>
<td>De-selects any selected items.</td>
</tr>
</tbody>
</table>
## Actions available after selecting (an) item(s):

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select None</strong></td>
<td>De-selects any selected items.</td>
</tr>
<tr>
<td><strong>Download</strong></td>
<td>If the item has a document file associated with it, this option enables you to download the file.</td>
</tr>
<tr>
<td><strong>Templates</strong></td>
<td>Enables users with the relevant permissions to export data, embedded within a Microsoft Word document based on a pre-prepared template.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>Edit selected items.</td>
</tr>
<tr>
<td><strong>Archive</strong></td>
<td>Archive selected items. Archived items are excluded from the searches except when in Show Archived mode. While in Show Archived mode, archived items can be selected and restored by users with relevant permissions.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Delete selected items. Deleted items are purged from the system after 2 years and are excluded from searches except when in Show Deleted mode. While in Show Deleted mode, deleted items can be selected and restored by users with relevant permissions.</td>
</tr>
<tr>
<td><strong>Destroy</strong></td>
<td>Destroy selected items. Destroy will permanently remove records from the database as part of the nightly purge job.</td>
</tr>
<tr>
<td><strong>Export</strong></td>
<td>Enables users with the relevant permissions to export data from the system, typically in a form which can be imported into other applications such as Microsoft Excel.</td>
</tr>
<tr>
<td><strong>Select None</strong></td>
<td>De-selects all selected items.</td>
</tr>
</tbody>
</table>
Actions available when **viewing an individual record**:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mark Unread</strong></td>
<td>Selecting this action will return you to the Home Page and mark any notifications as unread</td>
</tr>
<tr>
<td><strong>Follow</strong></td>
<td>Follow the record and receive notifications when a comment is added to the record</td>
</tr>
<tr>
<td><strong>Unfollow</strong></td>
<td>Stop following the record</td>
</tr>
<tr>
<td><strong>Export</strong></td>
<td>Enables export of data from the system, typically in a form which can be imported into other applications such as Microsoft Excel.</td>
</tr>
<tr>
<td><strong>Download</strong></td>
<td>If the current item has a document file associated with it, this option enables you to download the file.</td>
</tr>
<tr>
<td><strong>Rollover</strong></td>
<td>Within Worktribe Curriculum only, create a new version of the selected Programme or Module for the next academic year.</td>
</tr>
<tr>
<td><strong>Copy</strong></td>
<td>Within Worktribe Curriculum only, copy an existing Programme.</td>
</tr>
<tr>
<td><strong>Send to RepositorySync Queue</strong></td>
<td>This is rarely used. RepositorySync is the functionality which exports data from the Worktribe System into your public facing repository.</td>
</tr>
<tr>
<td><strong>Templates</strong></td>
<td>Enables creation of a Microsoft Word document based on a pre-prepared template, containing data from the selected record.</td>
</tr>
<tr>
<td><strong>Send to ProjectSync Queue</strong></td>
<td>This is rarely used. ProjectSync is the functionality which exports project/budget data from the Worktribe System into your finance systems. It normally happens automatically when a project becomes Live (and at other times thereafter) – but this menu option enables it to be done manually.</td>
</tr>
<tr>
<td><strong>Archive</strong></td>
<td>Archive this record.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Delete this record.</td>
</tr>
<tr>
<td><strong>Destroy</strong></td>
<td>Destroy this record.</td>
</tr>
</tbody>
</table>
7.3 Workflow

Worktribe uses workflow to manage the creation, modification and approval of records. Each record type has its own workflow.

Each workflow consists of a number of stages. At each workflow stage, records are assigned to one or more users. When a record is assigned to a user, it means there is an activity for that user to perform – such as giving or refusing approval or adding data that is required before progressing to the next stage. As a record moves from one stage to another, the workflow will automatically trigger the sending of notifications to the relevant people or groups.

Notice the **Submit for Approval** button in the screenshot above. The system will first check that all required fields have been completed and highlight any missing data. Once all the mandatory fields in this section are completed, the button will go green. Select this button to progress the record to the next stage.
8. Comments

The Comment Thread is a date and time ordered list of events and comments on a record. It is visible on the ‘Comments’ tab within the full view of the record.

New comments and events are added to the bottom of the comment thread. If you have the Profiles product enabled on your system, moving your mouse over a person’s name will show details about that person, and clicking on the name takes you to their profile.

The Comment Box allows you to comment on a record. To write a comment, simply click in the comment box, type your comment and press Enter to send. You can also put ‘new line’ characters into your comments by holding down the Shift key and pressing Enter.

You can also mention other people and groups by typing an @ character into the comment box, which brings up a list of names to pick from. Typing either a first or last name will bring up any matching users and groups. Selecting a name from the list or pressing Enter whilst an item on the list is highlighted, will complete the name, and you can continue submitting this comment that mentions them. Using this method will alert the named user or group as a direct notification. You can mention multiple people in the comment by using this method, and they will all be notified.

This can also be done with other records within your Worktribe system by typing a ‘#’ character, which will list records rather than people, and will not produce a ‘direct notification’ for that ‘mention’.

You can also mix mentions of people, groups and records:
Comments can be styled. Surrounding text with asterisks will make it bold. Surrounding text with backticks will preformat it, as shown below:

Becomes:

You can also flag (highlight) comments of particular note in the comments trail.

To flag a comment, click the lightbulb icon that appears on the right when you roll over the comment.

Flagging a comment highlights it for all users in the comment trail. Use it to mark comments of particular relevance.

You can remove the highlighting of the comment by clicking on the lightbulb icon again.

8.1 Annotation

Users who can comment on a record can now also add comments on specific parts of the record. This can be useful for collaboration and reviews as well as for adding notes.

Simply click the ‘+’ symbol to the right of any data item to add comments relating to that particular entity. The pop-up annotation box supports all the same features as the standard comments: @mentions, #references, *formatting* etc.
If you @mention someone, they will be notified about that particular annotation.

When there are annotations present on a particular item, the icon on the right changes style and colour, and also adds an indicator on the relevant tab so you can easily see where there are annotations.

In each annotation thread, the pop-up window has an option to 'Resolve' annotations that you no longer need. This will hide the indicators described above. These annotations still show in the general comments log for audit and review purposes.
9. Cover Images

The system includes a library of abstract imagery from Unsplash.com to help distinguish records and brighten up the system.

You can change the image for any record by clicking on the image in the header.

This allows you to choose from the library or to upload your own image. If you upload your own, you are now presented with options to crop the image, which can be particularly useful for logos and photos.

You can also change images from the Summary tabs on Profile, Project, Programme, Output etc. by clicking on the large image on the left. This works the same way, with the exception of Profile which doesn’t allow picking of an image from the library, instead encouraging the user to upload their own profile picture.
10. Searching

Worktribe has both quick search and advanced search capabilities.

Search results are limited to those records you are allowed to see.

10.1 Quick Search

Use the **Search** field in the Header to perform a quick search. The quick search is optimised to:

- Search for a record id
- Search for a code e.g. Finance Code
- Search for a title or a word in a title

The system will use your criteria to search across the records in the system.

The quick search will present the records that match your criteria. Select the desired record from the list to go directly to it. Note that the search term used in this example is **neuroscience**.

If the record you are looking for is not shown in the search results, select **See all records for...** which is at the bottom of the list, as shown in the screenshot below.
When you select this option, the results will be grouped by type onto tabs, as shown in the screenshot below.

10.1.1 Quick Search Tips

<table>
<thead>
<tr>
<th>Term</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>abstract manufacturing study</td>
<td>items that contain each of the words 'abstract', 'manufacturing', and 'study' somewhere, though not necessarily together</td>
</tr>
<tr>
<td>&quot;abstract manufacturing study&quot;</td>
<td>items that include the words 'abstract manufacturing study' together</td>
</tr>
<tr>
<td>+abstract -manufacturing</td>
<td>items that include the word 'abstract' but do not include the word 'manufacturing'</td>
</tr>
<tr>
<td>+Adam +(O'Leary)</td>
<td>items that include both the words 'Adam' and 'O'Leary' somewhere, though not necessarily together</td>
</tr>
</tbody>
</table>

10.2 Advanced Search

Advanced searching allows you to build more complex or detailed searches for individual records.

From the Menu Bar, select the relevant menu search option. For example; from the Projects menu drop-down list you can **Search Projects**. If enabled, there is also a triple bar next to the search bar as shown below.
When you are searching for Projects, the display will look like this:

Select **Advanced Criteria** to enter one or more levels of detail to search by, as shown in the screenshot below.
You can make searches more complex by adding further criteria using the + icon which will add a new lead criterion. You can use the ellipses - icon to add further sub-criteria. There is a limit to the total number of criteria you can add; the icon will turn grey when this limit has been reached.

Use the - icon to remove criteria. Where you have multiple criteria, you can specify if All or Any of the criteria should be met.

Use the Display tab to change how your search results are displayed; including what fields you want to return and the sort order.

After selecting Search, results are displayed.
10.2.1 Saving Searches

To save a search to use again, select **Save Search** from the results display. Or select **Change Search** to adjust the criteria further. The relevant portion of the screen is shown below:

If you use **Change Search** it will automatically update the criteria on the saved search. We recommend that all saved searches are created from scratch.

You can find saved searches by selecting the **Saved Searches** tab on your Home Page, or by selecting the Shared Searches option on the drop-down menu for the desired record type (e.g. Projects, or Outputs).

To remove a saved search, you can **Change Search** and then select Remove from the resulting display.

Contact [RAMS@abdn.ac.uk](mailto:RAMS@abdn.ac.uk) to find out how to request shared searches.
10.2.2 Exporting Search Results

If you can see the grey **Actions** button, you may select **Actions** then select **Export** to export the results of your search to an Excel, CSV or XML file in various layouts. The export options are presented as shown below.

- **Export all record data fields** will export all the data associated with the records – so for a list of projects, you would see all the underlying project information, not just that shown in the report.
- **Export search result column data only** exports only the information that you can see in the search results.
11. Your Profile

Your profile displays information such as email and job title. Most of the information in your Profile is pulled directly from your HR record. However, you may wish to add a profile picture.

11.1 View Profile

To view your profile, select [your name] in the header and then select My Profile. The resulting display is similar to the one below:

![Profile Display](image)

There are some differences between the Profiles available to all and our comprehensive Profiles+ product:

<table>
<thead>
<tr>
<th></th>
<th>Profiles</th>
<th>Profiles+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Details</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Qualifications</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Recognition</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Supervisions</td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>
11.2 Add a Profile picture

To add a profile picture, click **Upload Your Picture** under the Summary tab.

Drag an image file into the dotted area of the **Upload Image** dialog or click and browse to locate an image to upload, then click **Next**.

In the **Crop Picture** dialog, follow the instructions to crop your image to a square and save your profile picture.

To change your picture at any time, click on the image and repeat the process, replacing the old image with a new one.
11.3 Delegation

Delegation can be enabled within the system so that a user can specify other people to act on their behalf. Once delegation has been enabled then a new item shows in the profile drop-down menu.

A delegated user will have all your permissions, even if their own user account does not. For example, if you can see confidential information (such as detailed salary information), so can anyone whom you allow to delegate for you.

When enabled, a user can edit their profile and add delegation rights to other users by editing the Delegate To field.

The user with delegated rights can then log in as you using the drop-down selector:

If you are acting as a delegate for someone else, then their user name is highlighted to signify that you are acting on behalf of another user.

To stop acting as a delegate, use the same menu and select Delegate For > Myself.