



Finance Delegation Job Aid

NOTE: WORKDAY IS CONSTANTLY UPDATING THEIR TOOLS, SO THIS JOB AID
MAY NOT REFLECT EXACTLY WHAT YOU SEE IN WORKDAY.

FINANCE DELEGATION

Delegation is the assignment of any responsibility or authority to another person to carry out specific activities.

Because your tasks do not time-out, Workday allows managers to delegate. **The manager who delegates the work remains accountable for the outcome of the delegated work.** Check with your manager and local HRBP prior to starting this process.

Delegation can occur before (if granted) and during a business process.

1. Type **My Delegations** into the search bar and select it from the search results.

My Delegations

2. Click **Manage Delegations**.

Manage Delegations

3. You have the option to

Do Inbox Tasks on my Behalf: The person who is receiving the delegation can approve/review/edit business processes from your Inbox.

4. Enter the **Begin Date**.
5. Enter the **End Date**.
6. Enter the name of the person you wish to delegate to under **Delegate**.
7. If you would like to delegate your Inbox Tasks, you can select all business processes or only certain ones. Click the **For Business Process** box to search for and select business processes to delegate (available tasks are stated below).

Do Inbox Tasks On My Behalf

For all Business Processes

For Business Process

None of the above

8. Click **Submit**.

NOTE: Delegation will begin once approvals are finished. For immediate assistance, contact the Sysco Service Desk.

The following finance processes are available for delegation:

Business Process Type	Functional Area(s)
Ad Hoc Bank Transaction Event	Banking and Settlement
Ad Hoc Bank Transaction Intercompany Event	Banking and Settlement
Ad Hoc Bank Transaction Template Event	Banking and Settlement
Ad Hoc Payment Event	Banking and Settlement
Ad Hoc Payment Intercompany Event	Banking and Settlement
Bank Account Transfer Event	Banking and Settlement
Bank Account Transfer for Settlement Event	Banking and Settlement
Bank Account Transfer for Settlement Intercompany Event	Banking and Settlement
Bank Account Transfer Intercompany Event	Banking and Settlement
Bank Statement Event	Banking and Settlement
Payment Return Statement Event	Banking and Settlement

Verify Capital Project Expense	Capital Projects
Cash Sale Event	Customer Accounts
Cash Sale Intercompany Event	Customer Accounts
Customer Deposit Event	Customer Accounts
Customer Invoice Email Event	Customer Accounts
Customer Invoice Event	Customer Accounts
Customer Invoice Intercompany Event	Customer Accounts
Customer Invoice Maintenance Event	Customer Accounts
Customer Payment Application Event	Customer Accounts
Customer Refund Event	Customer Accounts
Customer Statement Event	Customer Accounts
Billing Schedule Event	Customer Contracts Project Billing
Customer Contract Amendment Event	Customer Contracts Project Billing
Customer Contract Event	Customer Contracts Project Billing
Revenue Recognition Installment Event	Customer Contracts Project Billing
Revenue Recognition Schedule Event	Customer Contracts Project Billing
Customer Event	Customers
Customer Payment Change Event	Customers
Customer Request	Customers
Accounting Adjustment Event	Financial Accounting
Accounting Journal Event	Financial Accounting
Accounting Journal Intercompany Event	Financial Accounting
Accounting Journal Unpost Intercompany Event	Financial Accounting
Accounting Journal Unpost-Reverse Event	Financial Accounting

Revaluation Run Event	Financial Accounting
Advanced Ship Notice Event	Procurement
Change Order	Procurement
Procurement Mass Close Event	Procurement
Purchase Order Acknowledgement Event	Procurement
Purchase Order Event	Procurement
Purchase Order Issue Event	Procurement
Purchase Order XML Issue Event	Procurement
Receipt	Procurement
Receipt Accrual Event	Procurement
Reopen Procurement Documents Event	Procurement
Request for Quote Event	Procurement
Requisition Event	Procurement
Requisition Sourcing Event	Procurement
Return to Supplier Event	Procurement
Create Supplier Contract Schedule Installments for Receipt	Procurement Supplier Contracts
Create Project	Project Tracking
Create Idea	Projects
Create Project Scenario	Projects
Rate Work	Projects
Request Worker	Projects
1099 Electronic Filing Run Event	Supplier Accounts
1099 MISC Adjustment	Supplier Accounts
Prepaid Spend Amortization Event	Supplier Accounts
Prepaid Spend Amortization Schedule Event	Supplier Accounts
Recurring Supplier Invoice	Supplier Accounts
Supplier Invoice Event	Supplier Accounts
Supplier Invoice Intercompany Event	Supplier Accounts
Supplier Invoice Request Event	Supplier Accounts

Catalog Load	Supplier Contracts
Supplier Contract Amendment Event	Supplier Contracts
Supplier Contract Event	Supplier Contracts
Supplier Contract Invoice Schedule Event	Supplier Contracts
Supplier Contract Purchase Order Schedule Event	Supplier Contracts
Supplier Alternate Name Change Event	Suppliers
Supplier Change Event	Suppliers
Supplier Classification Change Event	Suppliers
Supplier Contact Info Change Event	Suppliers
Supplier Event	Suppliers
Supplier Request	Suppliers
Supplier Settlement Bank Account Change Event	Suppliers
Enter Time	Time Tracking