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The *Create Internal Service Delivery (ISD)* business process (formerly known as Interdepartmental Requisitions (IDRs)) is used by the Workday roles of ISP Analyst and ISP Manager to record the exchange of *goods and services* between departments, where one department receives revenue and the other incurs expense.

About *Internal Service Providers (ISPs)*:

- An *Internal Service Provider (ISP)* was formerly known as a Service Center (e.g. Student Media, Veterinary Resources, HHG Gene Expression Service Center), while ISDs were formerly known as *Interdepartmental Requisitions (IDRs)*
- Not all transactions previously recorded on an IDR are initiated as ISDs in Workday. Some transactions will be entered in Workday as *accounting journals* (formerly known as non-cash journals) by the Accountant role, using the *Create Journal* business process to record moving funds from one account to another *without* the exchange of goods or services (refer to the [Create Journal](#) tip sheet)

This document will walk you through the following steps: [Create Internal Service Delivery](#), [Edit an Internal Service Delivery](#), and [Change an Internal Service Delivery](#).

The *Important Information* section on page 3 includes the following topics: [Split Costing](#), [Reporting](#), and [Helpful Links](#).

Create Internal Service Delivery

Before You Begin

1. Run the **View Internal Service Provider** report to verify that your department's ISP has been set up by an ISP Administrator in either the Controller's Office or the Office of Research Administration (ORA)
2. Ensure that you have appropriate Financial Data Model (FDM) values for this transaction:

- Your department's Program, in case you must update the default values in the *Revenue Information* section

- Spend Categories for any ad-hoc items

Note (1): Refer to the [FRS/FDM Conversion Tool](#), if necessary.

- The requesting department's Driver Worktag(s) (e.g. Program, Grant, Gift, or Project) to be charged

3. Ensure that you have relevant attachments (e.g. quote, Non-Availability of Equipment form), in electronic format (e.g. PDF, Excel), ready to attach during the business process

Create Internal Service Delivery

4. In the Workday *Search* field, type "*create internal*"
5. Click **Create Internal Service Delivery**

Complete Document Information

6. **(Required)** Click  to select your ISP's *Company*
7. **(Required)** Click  to select *Internal Service Provider*. The *Currency* field and *Revenue Information* section pre-populate based on your selection
8. **(Required)** *Document Date*: Click  to select today's date
9. **(Required)** Click  to select the *Delivery Date*. The *Delivery Date* can be any date, including today's date
10. **(Recommended)** *Memo*: Enter a detailed description of the goods and/or services being purchased by the requesting department. Use text that will help you find this ISD later

Review Revenue Information

The *Revenue Information* section pre-populates the default *Program*, *Cost Center*, and *Additional Worktags* that were set up by the ISP Administrator.

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Note (2): To correct these default values, contact your ISP Administrator.

11. Review the *Program*, *Cost Center*, and *Additional Worktags* fields for accuracy.

- To correct, clear the default values in the *Program*, *Cost Center*, and *Additional Worktags* fields
- Enter the correct *Program*. The *Cost Center* and *Additional Worktags* fields will pre-populate based on your selection

Complete Transaction Lines

12. Scroll down

13. Click  to add the first transaction line

14. (Required) Click  to select the requesting department's *Company*

Note (3): Different catalog items may be charged to different Companies using separate transaction lines, if applicable.

15. Do one of the following:

- Enter the *Description* for an ad-hoc item (e.g. Room Rental, Adult Aplysia 126-200 g), then click  to select *Spend Category*. The *Revenue Category* will pre-populate; OR
- Click  to select an *Item* from an internal catalog. Once you select a catalog *Item*, the *Spend Category*, *Revenue Category*, and *Unit of Measure* pre-populate. If the *Rate* was set up in the internal catalog, the *Unit Cost* also pre-populates

The Office of Research Administration recommends the use of internal catalog items if charging against Grants!

16. Enter *Quantity*

17. Click  to select *Unit of Measure*, if needed

18. Enter *Unit Cost*, if needed

19. The *Extended Amount* updates based on *Quantity* and *Unit Cost* values

20. (Recommended) Click  and type the *Requester's* name. The *Cost Center* and *Additional Worktags* will pre-populate

21. Click  to select the *Delivery Date*

22. (Recommended) Memo: Enter additional information about the catalog or ad-hoc item for the approver. Click **Expand** to enlarge the field. Click **Done** when you are done typing

23. To charge the requesting department, select ONE of the following Driver Worktags as appropriate.

Driver Worktags are mutually exclusive:

- Click  to select *Program*. Type the *Program* number (e.g. PG023501) or part of the *Program* name; OR
- Click  to select *Grant*. Type the *Grant* number (e.g. GR001005) or part of the *Grant* name. Alternatively, search for the *Grant* by hierarchy; OR
- Click  to select *Gift*. Select **All Gifts**, type the *Gift* number (e.g. EN000025, BG004634) or part of the *Gift* name; OR
- Click  to select *Project*. Select a *Project* by group or project. Alternatively, type the *Project* number (e.g. PR001002)

Note (4): Once you make a selection, relevant fields will pre-populate. Do not change *Cost Center* and *Additional Worktags* manually.

24. Under *Splits*, click  to allocate the requesting department's costing to more than one Driver Worktag. See [Split Costing](#) section on page 3 for more information

25. If additional transaction lines are needed:

- Click  to add another line
- Repeat steps 14 - 24 as needed

Internal Service Providers:

Create Internal Service Delivery (ISD)

ISP Analyst, ISP Manager

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Attach Documents

26. Click the **Attachments** tab

27. **(Required)** Add attachments:

- Click **Select files** and choose attachment
- Enter *Comment* to describe attachment for approvers
- Click **Upload** to add more attachments, if applicable

28. *External*: Leave unchecked ☐

Submit the Internal Service Delivery Form

29. Scroll up to review the accuracy of the *Total Extended Amount* in the upper, right-hand corner

30. Click **Submit**

- If you receive a red error message (“hard stop”), click the error to review it. After you have resolved the error, click **Submit** again
- If you receive an orange alert (“soft stop”), click the alert to review it. Ensure accuracy of the entry in question, change it if necessary, and click **Submit** again

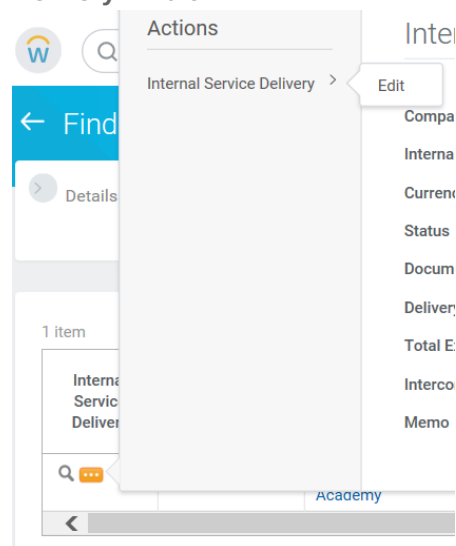
Edit an Internal Service Delivery

To modify an ISD before it is fully approved:

1. In the Workday *Search* field, type “find internal”
2. Click **Find Internal Service Deliveries**
3. **(Required)** Click  to select *Company*
4. **(Recommended)** Click  to select *Internal Service Provider*
5. **(Recommended)** Click  to select *Internal Service Delivery Status*
6. **(Recommended)** *Originated by*: Enter your name
7. Complete other fields as needed to aid in your search
8. Click **OK**

9. In the *Internal Service Delivery* column, locate the ISD you want to edit

10. Next to the , click  > **Internal Service Delivery > Edit**



11. Make changes as needed

12. Click **Submit**

13. Click **Done**

Change an Internal Service Delivery

To change an ISD after it has been approved:

1. Follow steps 1 - 9 under the [Edit an Internal Service Delivery](#) section
2. Next to the , click  > **Internal Service Delivery > Change**
3. Select **Apply header changes to all lines on Save or Submit**
4. Make changes as needed
5. Click **Submit**
6. Click **Done**

Important Information

Split Costing

1. Next to *Split by*, click  and choose from:

Internal Service Providers:

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- Amount; OR
- Quantity

2. Enter Percent or Amount

Note (5): Percentages may be entered using decimal places (e.g. 80.25%).

7. To charge the requesting department, select ONE of the following driver worktags as appropriate.

Driver worktags are mutually exclusive:

- Click  to select *Program*. Type the *Program* number (e.g. PG023501) or part of the *Program* name; OR
- Click  to select *Grant*. Type the *Grant* number (e.g. GR001005) or part of the *Grant* name. Alternatively, search for the *Grant* by hierarchy; OR
- Click  to select *Gift*. Select **All Gifts**, type the *Gift* number (e.g. EN000025, BG004634) or part of the *Gift* name; OR
- Click  to select *Project*. Select a *Project* by group or project. Alternatively, type the *Project* number (e.g. PR001002)

3. Click to add additional rows and repeat steps

Note (6): The Sum of all rows must equal 100 percent or total dollar amount. *Remaining Amount to Split* must be zero (0).

4. Click **Done**

Reporting

- **Find Internal Service Provider** – Find an ISP by (partial) *name*, *ID*, or *Company*. Click  to review all *ISP details*, including role assignments
- **Find Internal Service Deliveries** – Find Internal Service Deliveries by *Company*, *ISP*, *date*, and other criteria. Click  to view all *ISD details* including *Status*, *Memo*, and *Amount*
- **Find Internal Catalog Loads** – Find the catalog load by *Company*, *ISP*, or *Internal Catalog*. View

the *Catalog Loads*, *Effective Date*, *ISP's Company*, *Load Status*, and (updated) *items* for the retrieved Internal Catalog loads. ISP Managers may use this report to view other ISP's catalogs

- **View Internal Service Delivery** – This option allows you to select an existing Internal Service Delivery by *ISD number* or create a new one
- **View Internal Service Provider** – Select the ISP at the prompt to view ISP details including *Revenue Information*, *Internal Catalogs*, and *Assigned Roles*
- **View Internal Catalog** – Select an existing catalog at the prompt. View all *Catalog Items*, *Internal Item Identifiers*, *Item Descriptions*, *Spend Categories*, *Pricing History*, and more

Helpful Links

- [FRS/FDM Conversion Tool](#)
- [Tip Sheet: Create Internal Catalog](#)
- [Tip Sheet: Create Journal](#)
- [Tip Sheet: Financial Data Model \(FDM\)](#)