

Purchase Requisitioning: Create an Internal Service Delivery Request - Mini-Land Grant Conference Finance

This job aid supports the accounting for goods and services provided internally (intra-company). This type of transaction is processed in WorkDay through an Internal Service Delivery (ISD) request.



Note: An attachment is required in support of each ISD transaction. A good rule of thumb is if the documentation would easily explain and support the purpose of the charge 5 years from now.

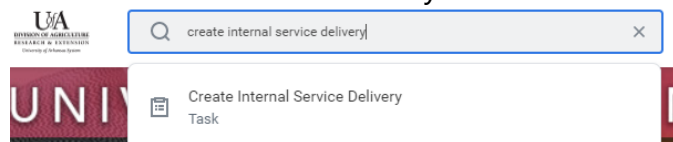


Note: Pre-payments or deposits are not allowed on UADA funds.

CREATE AN INTERNAL SERVICE DELIVERY REQUEST

From the homepage:

1. Search 'Create Internal Service Delivery' in the search bar.



Create Internal Service Delivery

Internal Service Delivery (empty) Status (empty) Document Number (empty) Total Extended Amount 0

Document Information

Company: Division of Agriculture of the University of Arkansas
Internal Service Provider:
Currency:
Document Date: 10/22/2020
Delivery Date: 10/22/2020
Memo:

Revenue Information

Cost Center:
Program:
Additional Worktags:

Lines Attachments

Lines: 0 items

| *Company | *Line Number | Item | Description | *Spend Category | Revenue Category | Quantity | Unit of Measure |
|----------|--------------|------|-------------|-----------------|------------------|----------|-----------------|
| No Data | | | | | | | |

2. Select **Company** (Division of Agriculture of the University of Arkansas).

3. Select **Internal Service Provider**

UADA | DIVISION | Mini-Land Grant Conference | ISP



Note: Once the Internal Service Provider is selected, the associated cost center and revenue categories tied to that provider default on to the request. **Do not change these elements.**

4. **Currency.** (USD), as applicable.
5. Change **Document Date**, as applicable.
6. Change **Delivery Date**, as applicable
7. Enter **Memo**, enter a detailed description meaningful to service center and charge approver
8. Click on the "+" found to the left of the gray box.



The box will expand and display the following line items

Lines: 1 item

| *Company | *Line Number | Item | Description | *Spend Category | Revenue Category | Quantity | Unit of Measure |
|---|--------------|------|-------------|-----------------|------------------|----------|-----------------|
| Division of Agriculture of the University of Arkansas | 1 | | | | | 0 | |

Complete the item line(s).



Note: It is best practice to only charge 1 cost center at a time. More than 1 Cost Center in a transaction slows the approval and review process.

| *Company | *Line Number | Item | Description | *Spend Category | Revenue Category | Quantity | Unit of Measure |
|---|--------------|------|-------------|-----------------|------------------|----------|-----------------|
| Division of Agriculture of the University of Arkansas | 1 | | | | | 0 | |

9. Enter **Item:**

a) Click menu icon

Select Catalog Items:

- Catalog Items
- Search for Item
- Search

b) Select Item:

The item amount, spend category and unit of measure will default

← Catalog Items

Registration

10. Enter the **Quantity**

11. The **Unit Cost** will default or it will need to be entered on the line, this is the cost per each item.

12. Enter **Memo**, enter a detailed description meaningful to service center and charge approver (Ok to copy what was entered in main memo)

13. Enter the **Cost Center** for member

14. Add a **Driver Worktag** – The assigned related worktags will default on to the requisition from the driver worktag chosen.

15. Click on the word "Attachments"

Lines Attachments

16. Upload any required attachments.



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17. Click the Submit button.

NEXT STEPS

The requester's role is complete in creating the Internal Service Delivery Request.

By clicking **Details and Process**, requisitioners can view the steps that have been completed. Any changes made to the Internal Service Delivery are tracked in the **Process History** table.

An approver receives a Workday Inbox task to either approve, deny or send back the Internally Service Delivery. An approver must provide a reason if sending the Internal Service Delivery request back.