

ICONS REFERENCED IN THIS JOB AID



CREATE INTERNAL SERVICE DELIVERY

If you need to order goods or services from a provider within SLU, you will create an Internal Service Delivery (ISD). This replaces our current Internal Departmental Order IDO process in Banner. This job aid explains how to create an Internal Service Delivery (ISD).

Steps:

1. From the Workday search bar, type **Create Internal Service Delivery** and access the task.

Document Information

1. Input the following information:
 - a. **Company:** Select Saint Louis University.
 - b. **Internal Service Provider:** Select the appropriate value.
 - c. **Currency:** This will auto-populate to USD.
 - d. **Document Date:** This will auto-populate to today's date.
 - e. **Memo:** Enter a description including the invoice number and PI, for example. This will be visible on the document view.

Revenue Information

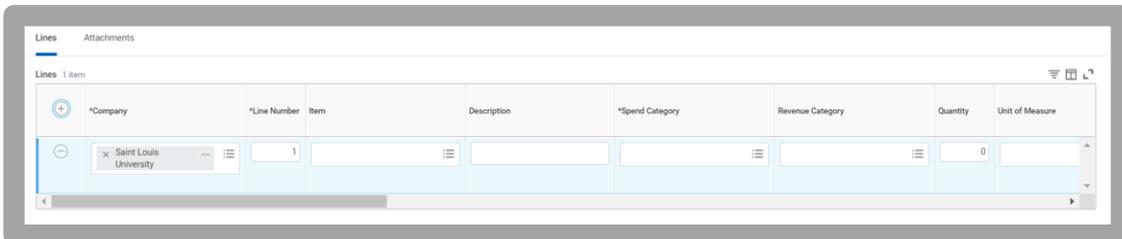
1. This section auto populates with the Credit Cost Center, Fund, and Function – no action required.



Note: This is the Service Department's Cost Center, Fund, and Function. Please do not change these values. The Service Department will update, as necessary.

Lines

Click the plus icon to add a new line.



1. Input the following information:
 - a. **Company:** This will auto-populate to Saint Louis University.

- b. **Item:** Select Catalog Items.



Note: Selecting the Item will auto-populate the Description, Spend Category, Revenue Category, and the Unit of Measure. Scroll to the right to see additional fields.

- c. **Revenue Category:** Leave this field blank.
- d. **Extended Amount:** Enter in the full amount.
- e. **Requester:** If you would like to enter the Principal Investigator, do so in this field. The Requester's Cost Center, Fund, and Function will default, and can be overridden.
- f. **Memo:** Enter a description of this line item. This text appears on the Report of Transactions.
- g. **Grant:** Select a Grant associated with the ISD, if applicable.
- h. **Gift:** Select a Gift associated with the ISD, if applicable.
- i. **Specialty:** Select a Specialty associated with the ISD, if applicable.
- j. **Program:** Select a Program associated with the ISD, if applicable.
- k. **Project:** Select a Project associated with the ISD, if applicable.
- l. **Cost Center:** Defaults from values entered above, if applicable, or select a Cost Center.

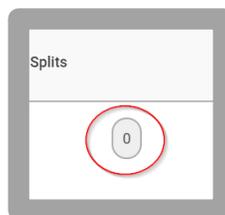


Note: Entering a Grant, Gift, Specialty, Program, Project, or Cost Center will auto-populate the Fund and Function fields.

m. **Additional Worktags**

- (1) **Activity Code:** Select an Activity Code, if applicable.
- (2) **Assignee:** Select an Assignee, if applicable.
- (3) **Location:** Select a Location, if applicable.

- n. **Split:** Select the Splits icon, if applicable.



- (1) If the requisition is split between cost centers or other FDM elements, indicate that by populating the following fields:
 - (a) **Split by:** Choose Amount
 - (b) **Percent:** Enter the percentage of how the requisition will be split, if applicable.
 - (c) **Amount:** Enter the Amount of the split, if applicable.
 - (d) **Memo:** Enter a description of this line item. This text appears on the Report of Transactions.

- (e) **Gift/Specialty/Program/Project/Cost Center:** Enter values, as applicable.
- (f) **Fund 31 Grants:** Do not use the 'Splits' option for Fund 31: Grants. If users are splitting the cost between two or more Grants, click the Plus icon under Lines to add row(s). This will ensure that the ISD routes for approval to the Principal Investigator on each Grant.
- (g) Click Done.

Attachments

1. Optional – Drop files here or select files.
2. Click **Submit**.
3. The ISD routes to the Internal Service Provider.



Note: The ISD routes to the Internal Service Provider for processing and then for Cost Center/Commitment approvals.