

03_Approve Internal Services Delivery

Purpose:	The purpose of this task is to approve an Internal Service Delivery.
How to Access:	Open you Workday Inbox and locate the Internal Service Delivery requiring approval.
Audience:	Reviewers and Approvers
Helpful Hints:	 Internal Service Deliveries have two levels of approval. The first level is technically a Review of the ISD. The second level is the Approval. Be sure to keep in mind that only select users will have access to create purchase order in Workday. If you are not authorized to create purchase orders, you will not be able to access this task. Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.
Procedure:	Complete the following steps to approve an internal service <i>d</i> elivery.



Create Internal Service Delivery

Inbox			
Actions 1	Archive	Review Internal Service Delivery	¢۷
Viewing: All 🗸 🗸	Sort By: Newest 🗸 🗸	Total Extended Arnount 159.60 USD	
Internal Service Delivery; CM 07/06/2017 for \$159.60 Requires your attention as inf 1 hour(s) sgo-Due 07/08/2017	SD Food Services on ormation has been changed 🟠	1 hour(s) ago - Due 07/08/2017 Internal Service Delivery Event Selected * Internal Service Delivery: CMSD Food Services on 07/06/2017 for \$159.60 Internal Service Delivery Internal Service Delivery: IS-00010 Status In Progress Document Number IS-00010 Budget Check Status Not Required on 07/06/2017 Document Information Revenue Information Company * X Cleveland Metropolitan School District Internal Service * X CMSD Food Services Provider * X CMSD Food Services Currency * X USD Document Date * 07 / 06 / 2017 Delivery Date 07 / 13 / 2017 Merrop	
		Lines 3 items	1 e ⁿ
		(+) *Company *Line Number Item De	15
		Cieveland Metropolitan School District Bagels	n 🌨
		Approve Send Back in Deny More Coffee Coffee Coffee with creating Coffee with creating Coffee Coffee with creating Coffee Coffee With Coffee Coffee Coffee With Coffee Co	

1. As Required, review and/or update the following fields:

Field Name	Required / Optional	Description	
Company	Required	This field is always CMSD.	
Internal Service Provider	Required	Always enter CMSD Food Services.	
Currency	Required	Auto populates based on internal service provider selection, but should always default	
Document Date	<u>Do Not</u> Change	Auto populates with current date.	
Delivery Date Required		Select the required service delivery date.	
Memo	Optional	Add a comment regarding the service delivery.	
Fund	Required	Auto populates based on internal service provider selection, and should default to Food Services.	



Field Name	Required / Optional	Description
Cost Center	Pequired	Auto populates based on internal service
	nequireu	Services Administration.
Function	Required	Auto populates based on internal service provider selection, and should default to Purchasing, Preparation and Dispensing Services.
Program	Required	Auto populates based on internal service provider selection, and should defaults to Department Budget.

- 2. Scroll down to the *Lines* section.
- 3. As required, review and/or update the following fields for each line item:

Field Nome	Required /	Description	
Field Name	Optional		
Company	Required	This field is always CMSD.	
Line Number	Poquirod	Auto populates based on the number of lines	
	Required	added to the service delivery	
		Identify the item to include in the order.	
Item	Required	Note: Search the catalog to select the	
		required items.	
Description	Required	Auto populates based on the selected item.	
Spend Category	Required	Auto populates based on the selected item.	
Revenue Category	<u>Do Not Use</u>	Leave blank.	
	Required	Identify the number of items to order.	
Quantity		Note: Some items require a minimum or	
		maximum order quantity.	
	Required	Identifies how the requested item is sold.	
		Examples include:	
Unit of Measure		• Each	
		• Box	
		Case	
Unit Cost	Required	Identifies the cost for each item.	
Extended Amount	Poquirod	System calculated amount based on the unit	
Extended Amount	Required	cost and quantity being procured.	
Paguastar	Ontional	Identifies the employee entering the Internal	
Requestor	Optional	Service Delivery.	



Field Name	Required / Optional	Description
Delivery Date	Required	Identifies the requested delivery date for the order. <u>Note:</u> This value auto populates from header Delivery Date, but it can be changed.
Memo	Optional	Use to provide additional information for the line item.
Fund	Required	Identifies the fund that will pay for the items being ordered.
Cost Center	Required	Identifies the cost center that will pay for the items being ordered.
Function	Required	Identifies the function that will pay for the items being ordered.
Program	Required	Identifies the program that will pay for the items being ordered. <u>Note:</u> Workday defaults this value after entering the cost center.
Additional Worktags	Optional	Use when creating an order being paid by a Grant, Gifts, or Projects. <u>Note:</u> Workday overwrites or defaults in the correct Fund matching the Grant entered in this field.
Splits	Optional	Identifies if the line item is to be split out to multiple budgets.

4. As Required, complete one of the following:

If you want to	Then	Go to
Approve the purchase order,	Click Approve .	<u>Step 5</u>
Return the purchase order to the initiator for updates,	Send Back	<u>Step 6</u>
Reject the purchase order,	Click Deny .	<u>Step 9</u>



Success! Event approved



5. Review the displayed information.

Note: You have completed this task, proceed to the *Result* section of this document.



Send Ba	ck	
To *		:=
Reason ★		Æ
Submit	Cancel	

6. Complete the following fields:

Field Name	Required / Optional	Description
То	Required	Indicate who to send the Internal Service Delivery back to for updates. <u>Note:</u> Reviewers can send the ISD back to the Initiator, and Approvers can send it back to the Initiator or the Reviewer.



Field Name	Required / Optional	Description
Reason	Required	Enter an explanation why the Internal Service Delivery is being sent back.

7. Click Submit.

Inbox – Internal Service Delivery

Inbox		
Actions 2 Viewing: All Sort By: New Internal Service Delivery: CMSD Food Service 07/06/2017 for \$159.60 41 second(s) ago - Due 07/08/2017 Time Off Request: Laurence Wade (494131) 3 month(s) ago - Due 03/18/2017; Effective 03/2	Archive est V V es on Calculate Calculate	Internal Service Delivery: CMSD Food Services on 07/06/2017 for \$159.60 (Actions) 41 second(s) ago - Due 07/08/2017 Up Next
Time Off Request: Natasha Lewis (495928) 3 month(s) ago - Due 03/18/2017; Effective 03/1	16/2017 ^{රු}	Due Date 07/08/2017 Details and Process Done

8. Review the displayed information, and go to the **Results** section of this document.

Deny

Deny	
	Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below.
Reason ★	
Submit	t Cancel

9. Complete the following field:

Field Name	Required / Optional	Description
Reason	Required	Enter an explanation why the Internal Service Delivery is being denied.



10. Click Submit.

Inbox – Event denied



11. Review the displayed information, and continue to the **Results** section of this document.

Result:

You have successfully created an Internal Service Delivery, click **Done** to exist this task.