

01_Find Internal Services Delivery

- Purpose:*** The purpose of this task is to search Workday for internal service deliveries.
- How to Access:*** Enter **Find Internal Service Delivery** in the Workday **Search** field, press **Enter**, and click **Find Internal Service Delivery** from the *Search Results* section.
- Audience:*** Buyers
- Helpful Hints:***
- 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 search for internal service deliveries.

Find Internal Service Deliveries

Find Internal Service Deliveries

Company	*	<input type="text"/>	⋮
Internal Service Provider		<input type="text"/>	⋮
Document Number		<input type="text"/>	
Internal Service Delivery Status		<input type="text"/>	⋮
Document Date On or After		<input type="text" value="06 / 06 / 2017"/>	📅
Document Date On or Before		<input type="text" value="MM / DD / YYYY"/>	📅
Intercompany		<input type="checkbox"/>	
Created by		<input type="text"/>	⋮
Approved by		<input type="text"/>	⋮
Internal Catalogs		<input type="text"/>	⋮

Manage Filters
0 Saved Filters

OK
Cancel

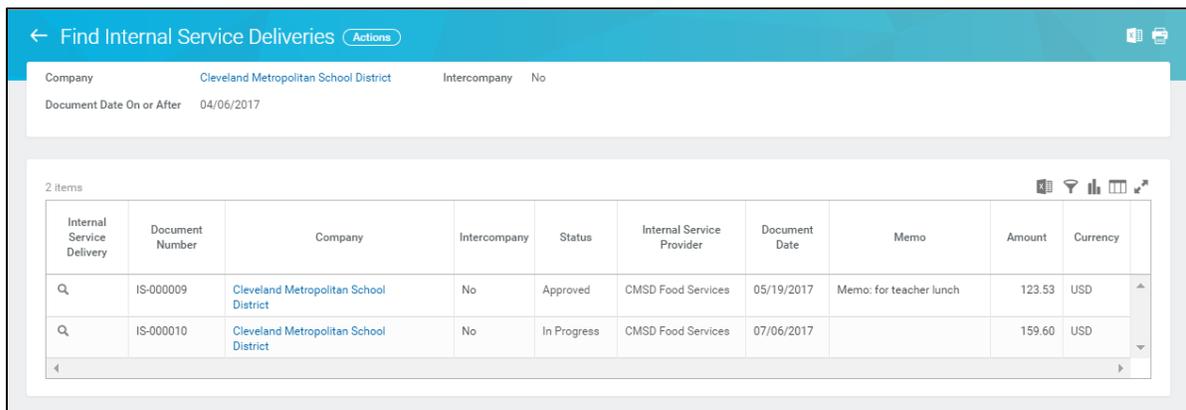
- As Required, complete, review, and/or update the following fields:

Field Name	Required / Optional	Description
Company	Required	This field is always CMSD.
Internal Service Provider	Optional	At this time, the only available option is CMSD Food Services .
Document Number	Optional	Enter specific internal service delivery numbers.
Internal Service Delivery Status	Optional	Select specific statuses to search for the required internal service deliveries.
Document Date On or After	Required	Enter a specific date to search for internal service deliveries created on or after. Note: Auto populates with current date.
Document Date On or Before	Optional	Enter a specific date to search for internal service deliveries created on or before.

Field Name	Required / Optional	Description
Created by	Optional	Enter specific users, to search for internal service deliveries by the person who created it.
Approved by	Optional	Enter specific approvers, to search for internal service deliveries by the person responsible for approving it.

2. Click **Ok** to execute the report.

Find Internal Service Deliveries - Results



Internal Service Delivery	Document Number	Company	Intercompany	Status	Internal Service Provider	Document Date	Memo	Amount	Currency
Q	IS-000009	Cleveland Metropolitan School District	No	Approved	CMSD Food Services	05/19/2017	Memo: for teacher lunch	123.53	USD
Q	IS-000010	Cleveland Metropolitan School District	No	In Progress	CMSD Food Services	07/06/2017		159.60	USD

Note: Based on the selection criteria entered on the previous screen, different Header Level fields display. For the purpose of this job aid, the report was executed using the **Document Date On or After** field.

3. As required, review the following fields to locate the required internal service delivery:

Field Name	Required / Optional	Description
Document Number	Required	Identifies the document number for the Internal Service Delivery.
Status	Required	Indicates the current status of the Internal Service Delivery.
Document Date	Required	Identifies the date the Internal Service Delivery was created.
Memo	Optional	Lists any additional information the initiator entered during the creations or maintenance of the Internal Service Delivery.
Amount	Required	Indicates the total amount of the Internal Service Delivery.

4. Click **Q** to the left of the required **Document Number** to view the internal service delivery details.

View Internal Service Delivery

View Internal Service Delivery 📄 🖨️

Total Extended Amount
159.60 USD

Internal Service Delivery 🔍 Status: In Progress Document Number: IS-000010 Budget Check Status: Not Required on 07/06/2017

Document Information

Company: Cleveland Metropolitan School District

Internal Service Provider: CMSD Food Services

Currency: USD

Document Date: 07/06/2017

Delivery Date: 07/13/2017

Intercompany: No

Memo: (empty)

Revenue Information

Fund: 006FD_L Food Services

Cost Center: 3013CC Food Service Administration

Function: 3120FN Food Purchasing, Preparation And Dispensing Services

Program: 100PG Department Budget

Lines | Process History

Lines 3 Items 🔍 📄 🖨️ 📱

Line	Company	Line Number	Item	Item Description	Spend Category	Revenue Category	Quantity	Unit of Measure	Unit Cost
🔍	Cleveland Metropolitan School District	1	Bagels	Bagels w/cream cheese and jelly	569SC Other		20	Each	3.30
🔍	Cleveland Metropolitan School District	2	Coffee	Coffee with creamers, sugars	569SC Other		20	Each	1.10
🔍	Cleveland Metropolitan School District	3	Continental Breakfast	Continental includes mini muffins, mini danish, bagels w/cream cheese, coffe and OJ	569SC Other		20	Each	3.58

- Review the displayed information.

Note: From this screen you can modify the Internal Service Delivery by clicking  to the right of **Internal Service Delivery 🔍**, select **Internal Service Delivery**, and click **Change** or **Edit**. It is only possible to Edit Internal Service Deliveries that have a status of **Draft** or **In Progress**. You must Change Internal Service Deliveries that have an **Approved** status.

Result:

You have successfully executed the Find Internal Service Delivery report, click **Done** to exist this task.

Note: For additional information on modifying an Internal Service Delivery, refer to the **02_Edit-Change Internal Service Delivery** job aid.