

02_Edit-Change Internal Services Delivery

- Purpose:*** The purpose of this task is to modify an existing **Internal Service Delivery**.
- How to Access:*** After locating the required Internal Service Delivery, click , select **Internal Service Delivery**, and click **Edit** or **Change**.
- Audience:*** Buyers
- Helpful Hints:***
- For additional information on locating Internal Service Deliveries, refer to the **01_Find Internal Service Delivery** job aid. If you are looking for an Internal Service Delivery you created, they can be located in your Workday **Inbox, Archive** tab.
 - 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 modify an Internal Service Delivery.

Edit/Change Internal Delivery

Edit Internal Service Delivery

Total Extended Amount
159.60 USD

Minimum Order Requirement: **12 people**
 For further details, please visit [Food & Child Nutrition Services](#)

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

Document Information

Company *

Internal Service Provider *

Currency *

Document Date *

Delivery Date

Memo

Apply header changes to all lines on Save or Submit

Revenue Information

Fund *

Cost Center *

Function *

Program *

Lines | Process History | Attachments

+	*Company	*Line Number	Item	Description	*Spend Category
Lines 3 items					

Submit
Save for Later
Cancel

Note: Depending on the status of the Internal Service Delivery, you can **Edit** or **Change** the order. For the purpose of this job aid, the status of the Internal Service Delivery is **In Progress**.

- As required, complete, review and/or update the following **Header-Level** 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 to USD.
Document Date	<u>Do Not Change</u>	Auto populates with current date.
Delivery Date	Required	Select the required service delivery date.
Memo	Optional	Add a memo regarding the service delivery.

Field Name	Required / Optional	Description
Fund	Required	Auto populates based on internal service provider selection, and should default to Food Services.
Cost Center	Required	Auto populates based on internal service provider selection, and should default to Food 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. As required, complete, review and/or update the following **Line Item** fields:

Field Name	Required / Optional	Description
Company	Required	This field is always CMSD.
Line Number	Required	Auto populates based on the number of lines added to the service delivery
Item	Required	Identify the item to include in the order. 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
Quantity	Required	Identify the number of items to order. Note: Some items require a minimum or maximum order quantity.
Unit of Measure	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> • Each • Box • Case
Unit Cost	Required	Identifies the cost for each item.
Extended Amount	Required	System calculated amount based on the unit cost and quantity being procured.
Requestor	Optional	Identifies the employee entering the Internal Service Delivery.

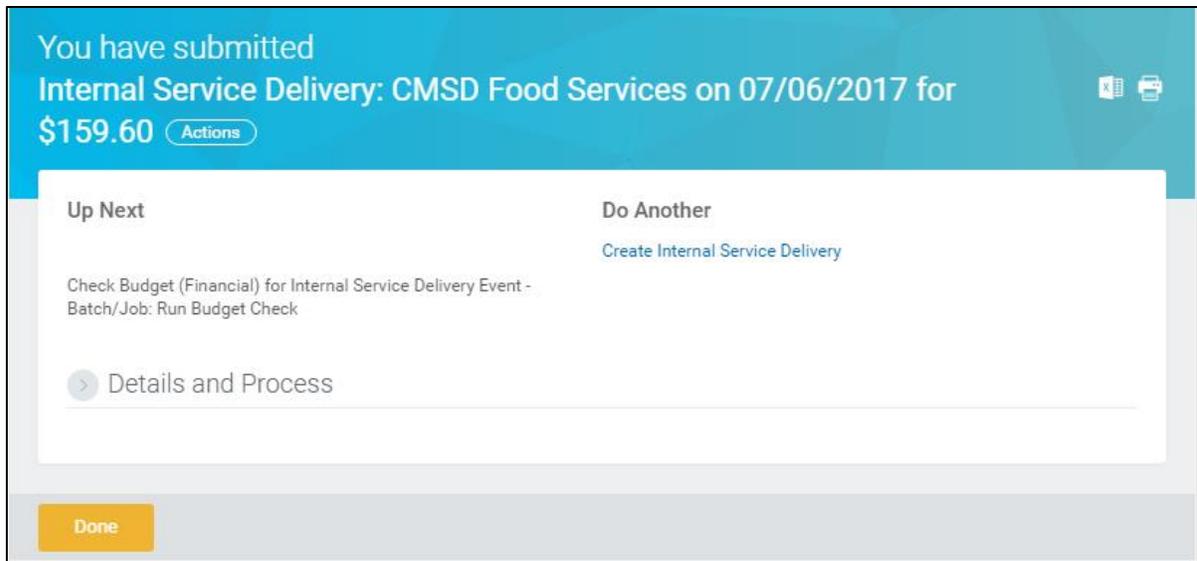
Field Name	Required / Optional	Description
Delivery Date	Required	Identifies the requested delivery date for the order. Note: This value auto populates from header Delivery Date, but it can be changed.
Memo	Optional	Use to provide additional information for the line item.
Fund	Required	Identifies the 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. Note: 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. Note: 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.

3. As required, complete one or more of the following:

If you want to...	Then...	Go To
Add new line items,	Click  .	Step 2
Remove an existing line,	Click  to the left of the required line item.	-
Submit the order,	Click Submit .	Step 4
Save the order for processing at a later time,	Click Save for Later .	Step 5

If you want to...	Then...	Go To
Cancel the Internal Service Delivery or submission,	<p>Click Cancel.</p> <p>Note: If canceling before Saving for Later, the order is deleted. If canceling after Saving for Later, only the submission is canceled, and the order can be access.</p>	-

You have submitted



The screenshot shows a confirmation message: "You have submitted Internal Service Delivery: CMSD Food Services on 07/06/2017 for \$159.60". Below this, there are two columns of options: "Up Next" with a link to "Check Budget (Financial) for Internal Service Delivery Event - Batch/Job: Run Budget Check" and "Do Another" with a link to "Create Internal Service Delivery". A "Details and Process" link is also visible. A "Done" button is at the bottom left.

4. Review the displayed information. You have completed this task, continue to the *Results* section of this document.

View Internal Service Delivery

View Internal Service Delivery 📄 🖨️

Total Extended Amount
159.60 USD

Internal Service Delivery Status Draft 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 Measure	Unit Cost
<input type="text" value="1"/>	Cleveland Metropolitan School District	1	Bagels	Bagels w/cream cheese and jelly	569SC Other		20	Each	3.30
<input type="text" value="2"/>	Cleveland Metropolitan School District	2	Coffee	Coffee with creamers, sugars	569SC Other		20	Each	1.10
<input type="text" value="3"/>	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. You have completed this task, continue to the *Results* section of this document.

Result:

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