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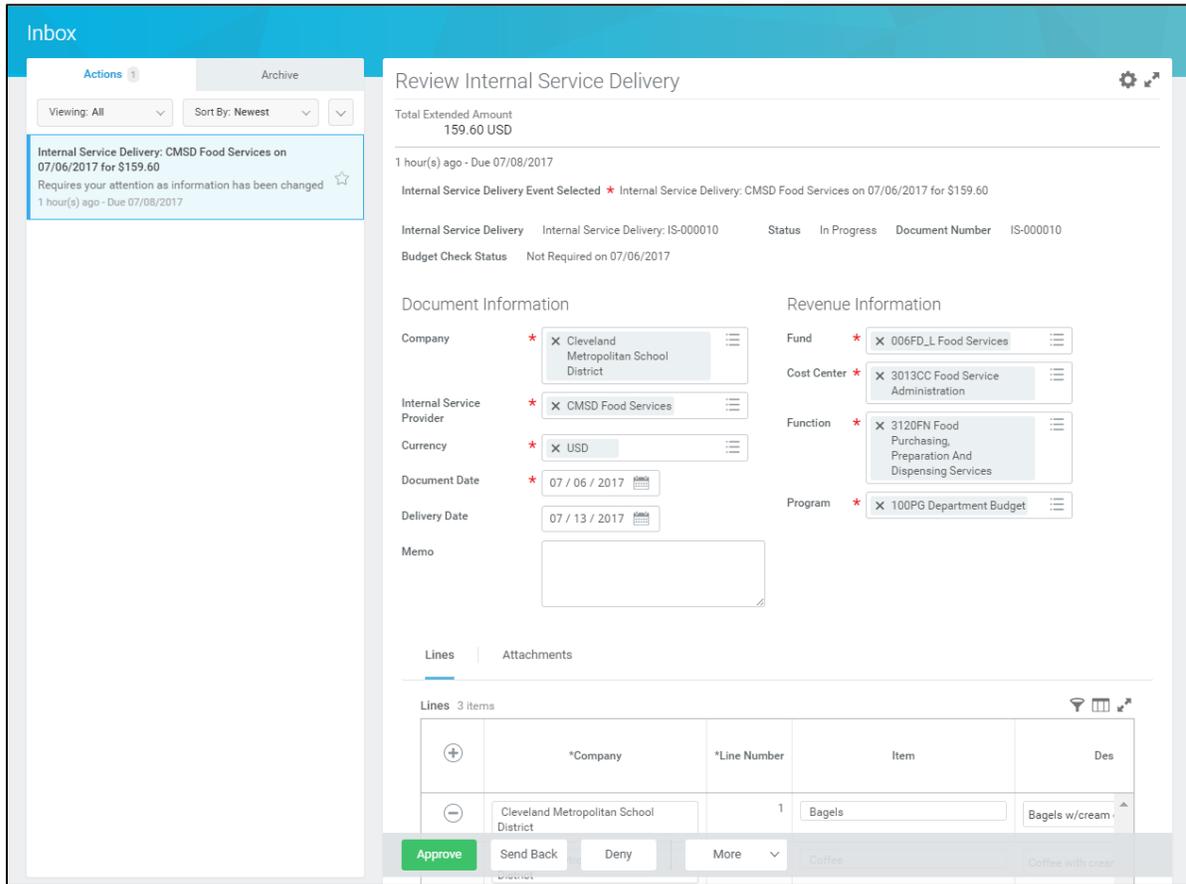
1. As Required, review and/or update the following fields:

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

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: • 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.

4. As Required, complete one of the following:

If you want to…	Then…	Go to
Approve the purchase order,	Click **Approve** .	Step 5
Return the purchase order to the initiator for updates,	Click Send Back .	Step 6
Reject the purchase order,	Click **Deny**.	Step 9
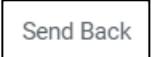
Success! Event approved
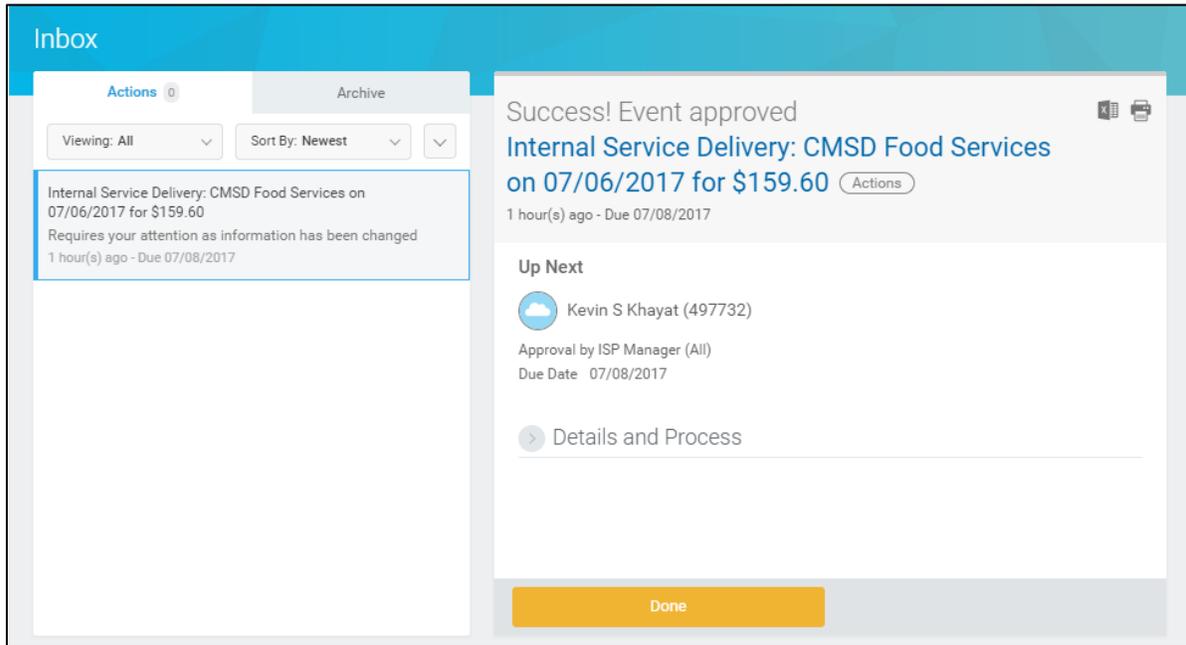
5. Review the displayed information.
   Note: You have completed this task, proceed to the *Result* section of this document.

Send Back

6. Complete the following fields:

Field Name	Required / Optional	Description
To	Required	Indicate who to send the Internal Service Delivery back to for updates. **_Note:_** 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
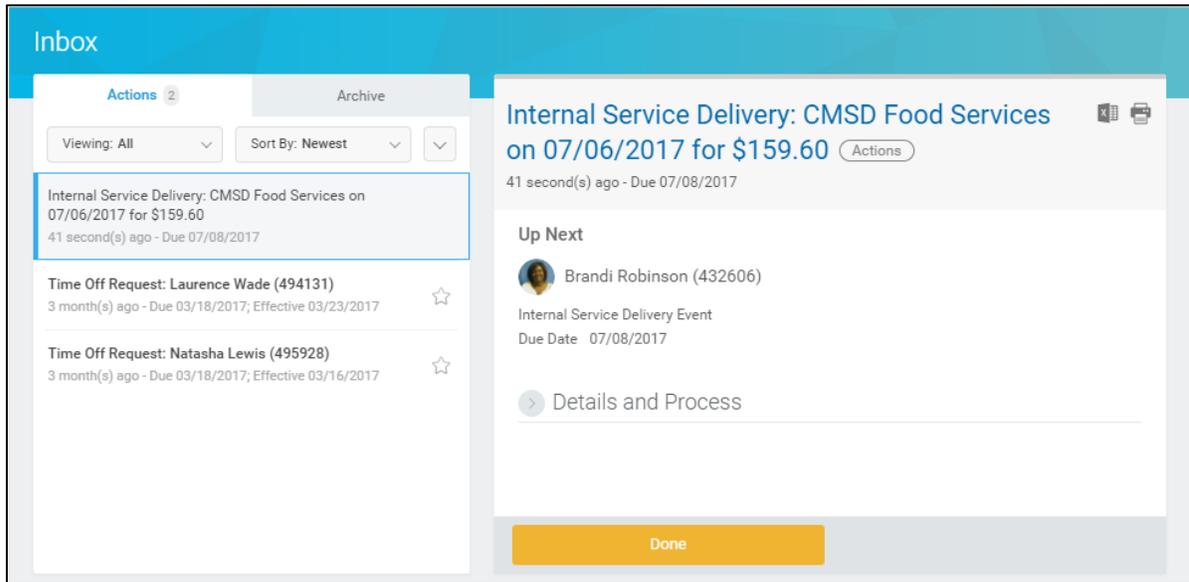
8. Review the displayed information, and go to the **Results** section of this document.

Deny

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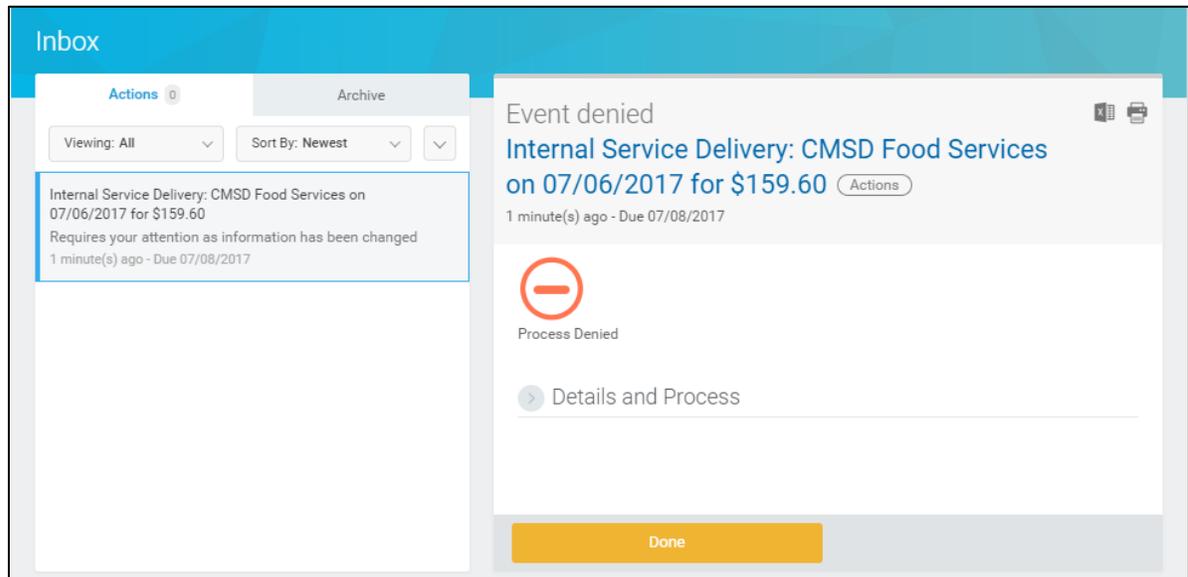
11. Review the displayed information, and continue to the **Results** section of this document.

Result:

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