

## Edit or Change Internal Service Delivery Overview

This Quick Reference Guide (QRG) is designed to walk an **Internal Service Delivery Data Entry Specialist** through the process of editing an Internal Service Delivery (ISD) in draft or changing an approved ISD in Workday. This procedure will show you how to make edits or changes to an ISD. If you need to completely remove the ISD, see the Cancel ISD Quick Reference Guide used to request cancellation of an ISD by the ISP Administrator.



You should only Change ISDs for the Internal Service Provider (ISP) associated to your area. You should NOT Change ISDs for other ISPs. Changing the ISD reverses the initial operational journal that was created to create a new one with the changes. It affects both sides of the ISD, and it can cause confusion when the ISP sees it in their Account Certification.



Do NOT use the **Change ISD** task if there is a **Grant** worktag on the ISD. If ISDs with a Grant have changes that need to be made, you will need to create an **Accounting Journal** to make the changes. If you try to Change an ISD with a Grant, the ISD will be moved into “draft” status, the original accounting will be backed out, and the only option will be to re-enter the ISD.

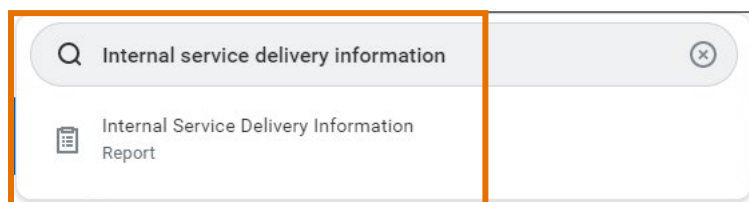
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## Procedure: Edit Internal Service Delivery

On the Workday **Home** screen:

1. Type **Internal Service Delivery Information** in the search field.
2. Select **Internal Service Delivery Information** from the **Search Results**.



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On the **Internal Service Delivery Information** screen:

3. Complete the following fields:
  - **Company** - select the relevant company in the **Company** field.
  - **Internal Service Delivery Status** - select **Draft** from the drop-down list in the **Internal Service Delivery Status** field.



You can only edit an **Internal Service Delivery** in **Draft** status.

All other prompts on the **Internal Service Delivery Information** screen that are not mentioned above are optional but can help you narrow down your search.

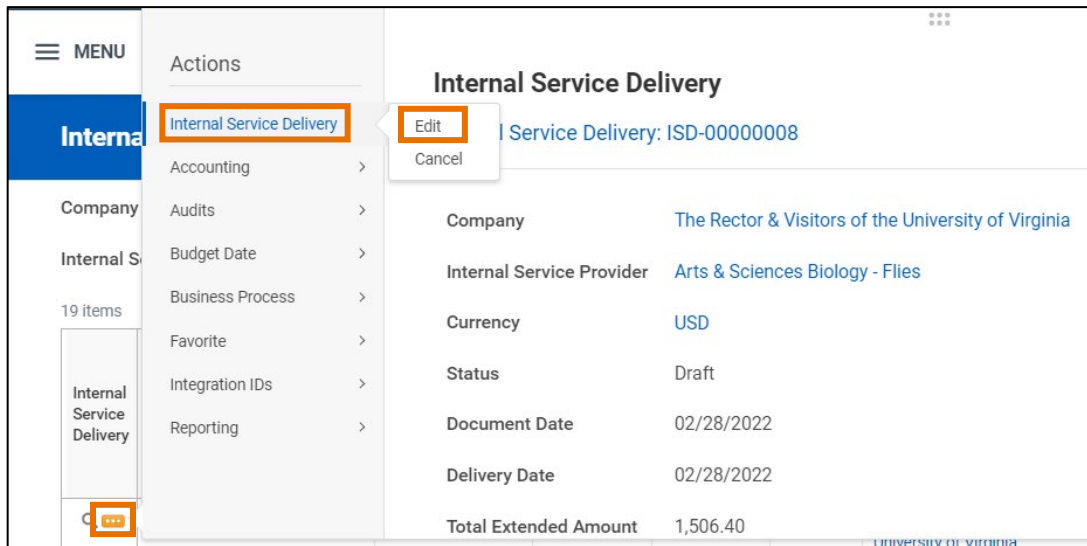
4. Click **OK** to proceed.

On the second **Internal Service Delivery Information** screen:

5. Select the **Related Actions** button next to the **Internal Service Delivery** that you want to edit.

On the **Related Actions** menu:

6. Select **Internal Service Delivery > Edit**.



On the **Change Internal Service Delivery** screen:

7. Edit (if needed) the information under the **Document Information** section as required.
8. Edit (if needed) the information under the **Revenue Information** section as required.
9. Select the **Apply header changes to all lines on Save or Submit** checkbox to apply header changes to all lines.
10. Edit (if needed) the information under the **Lines** tab as required.
11. Click **Submit** to submit the ISD.

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All fields under the **Attachments** tab are optional.

You have successfully completed this task. It will now be routed based on the workflow.

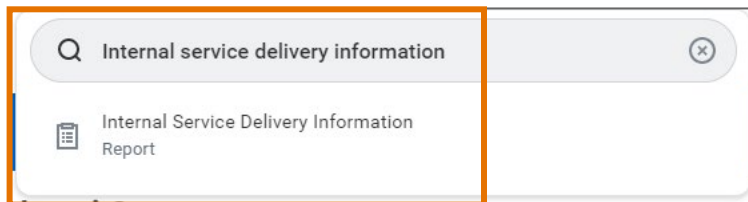
### Procedure: Change Internal Service Delivery



If the approved ISD includes a Grant, please use an Accounting Journal instead of the Change ISD process. If you attempt to submit your changed ISD that had a Grant, you will receive an error message.

On the Workday **Home** screen:

4. Type **Internal Service Delivery Information** in the search field.
5. Select **Internal Service Delivery Information** from the **Search Results**.



On the **Internal Service Delivery Information** screen:

6. Complete the following fields:
  - **Company** - select the relevant company in the **Company** field.
  - **Internal Service Delivery Status** - select **Approved** from the drop-down list in the **Internal Service Delivery Status** field.



You can only change an **Internal Service Delivery** in an **Approved** status.

All other prompts on the **Internal Service Delivery Information** screen that are not mentioned above are optional but can help you narrow down your search.

7. Click **OK** to proceed.

On the second **Internal Service Delivery Information** screen:

8. Select the **Related Actions** button against magnifying glass of the **Internal Service Delivery** that you want to change.

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On the **Related Actions** menu:

9. Select **Internal Service Delivery > Change**.


The screenshot shows a web application interface. On the left is a navigation menu with 'Home' and 'Internal Service Delivery' (highlighted). A 'Related Actions' menu is open from 'Internal Service Delivery', with 'Internal Service Delivery' and 'Change' highlighted in orange. The main area displays the 'Internal Service Delivery' form for 'Service Delivery: ISD-00000004'. The form contains the following fields:

Company	The Rector & Visitors of the University of Virginia
Internal Service Provider	Arts & Sciences Chemistry - Storeroom
Currency	USD
Status	Approved
Document Date	10/13/2021
Delivery Date	10/13/2021
Total Extended Amount	251,000.00
Intercompany	Yes

At the bottom of the form, there is a search bar with a magnifying glass icon and a list of results, including 'Storeroom'.

On the **Change Internal Service Delivery** screen:

12. Change (if needed) the information under the **Document Information** section as required.
13. Change (if needed) the information under the **Revenue Information** section as required.
14. Select the **Apply header changes to all lines on Save or Submit** checkbox to apply header changes to all lines.
15. Change (if needed) the information under the **Lines** tab as required.
16. Click **Submit** to submit the change request.

	All fields under the <b>Attachments</b> tab are optional.
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You have successfully completed this task. It will now be routed based on the workflow.