ISR Process for
Internal Service Requester

BU BUworks Central
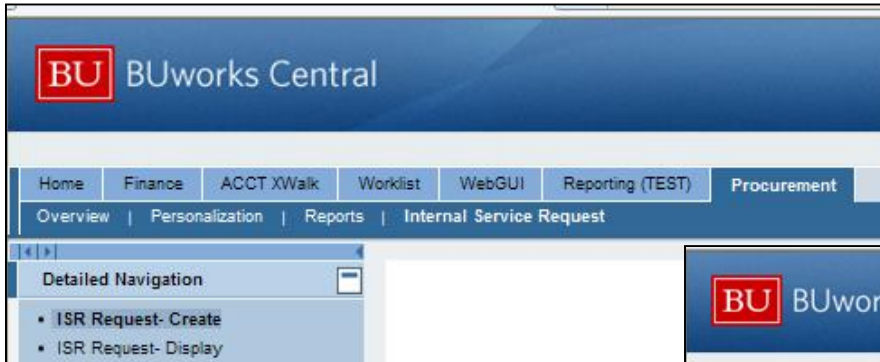
Course Outline

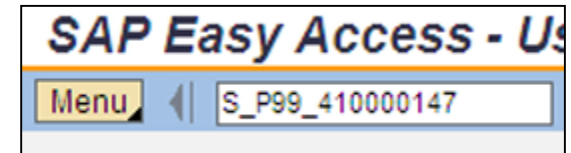- ## Internal Service Request Process Overview

The **Requester**, through the Procurement/ISR process, creates the Internal Service Request (ISR)

The **Provider**, through Finance / ISR Fulfillment posts charges against the ISR

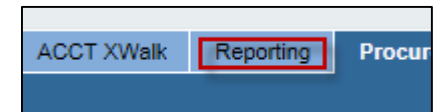- ## Internal Service Request Form - Create

A Requesters will use the Internal Service Request process to request services and record the transaction on the financial system.

- ## ISR WebGUI and BW Reports

A Requesters uses available reports to track the life cycle of an ISR form.

Internal Service Request Process Overview

- Requesters submit online ISR forms for services to Internal Service Providers:

Internal Service Request Process Overview

- When the ISR Request is submitted,

    the Internal Provider receives an e-mail notification

From:	☐ BUWTN503 [mailto:BUWTN503@bu.edu]
To:	☑ Mulligan, Brian; bu@bcdtravel.com
Cc:	
Subject:	FW: ISR Request: 9040022830 created on: 02/26/2013

✉ Message 🗎ISR PDF Copy.PDF (17 KB) 🗎excel file test.XLS (26 KB) 🗎pdf file test.PDF (98 KB) 🗎This is a word test.DOC (13 KB)
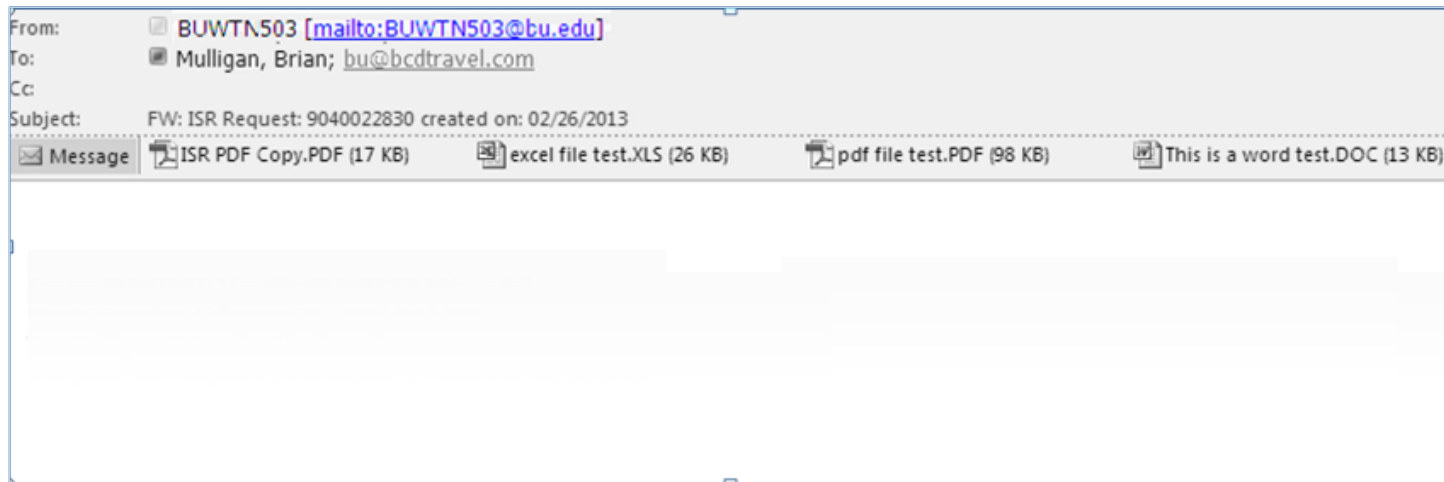
Important **Note** – <u>Only one email address is required</u>.
Do not enter multiple emails.
If entered the notification will not be sent to anyone.

Internal Service Request Process Overview

The ISR Request Display is available on the **Procurement** and **Finance** tabs of the **BUworks Central portal.**
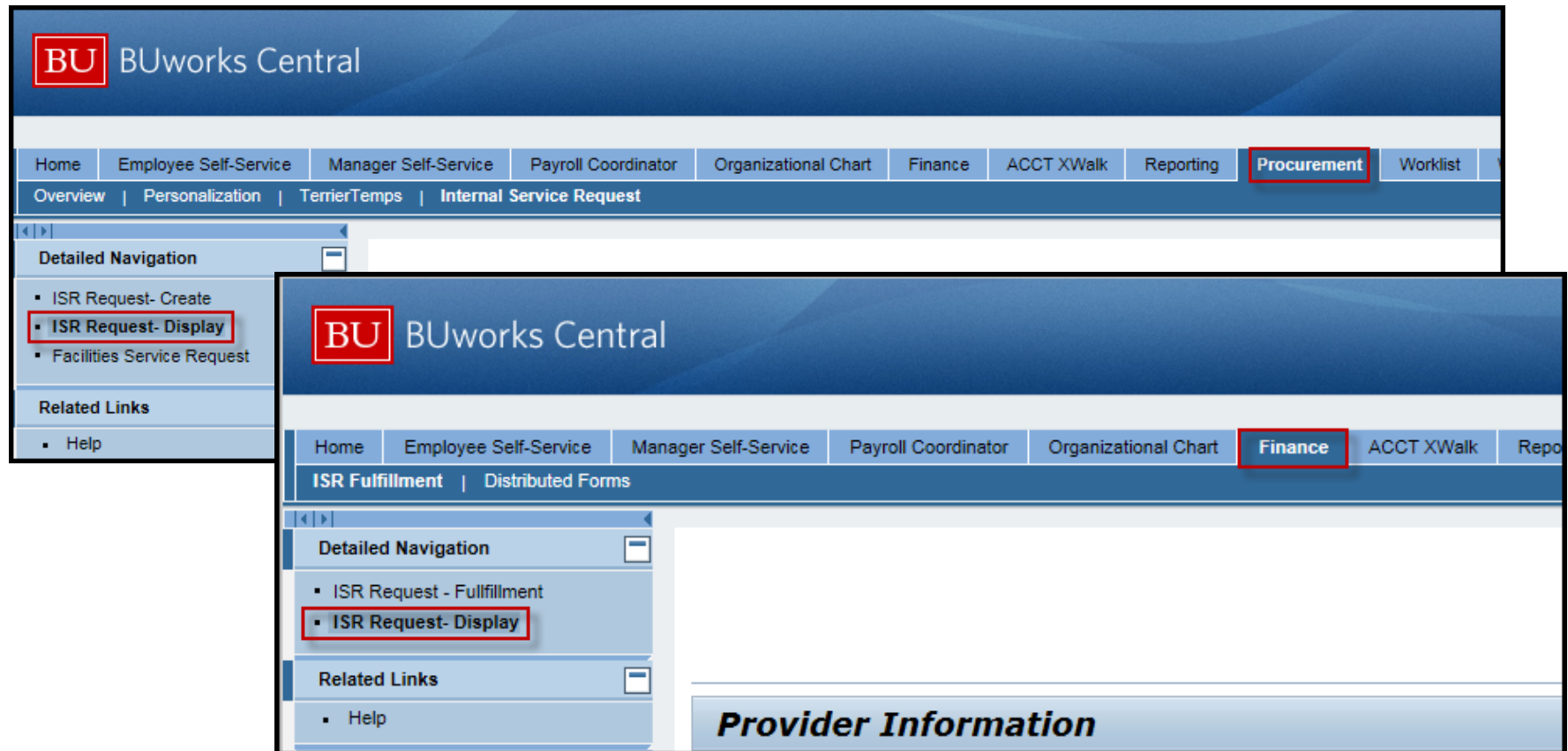
Internal Service Request Process Overview

- **ISR Reporting -** Through Reports tab you can find a list of open requests in the system and view them by Provider.

  - Through the **Reporting** Tab of the **BUworks Central portal** for **Accounting (FI), Funds Management (Distributed) Reports**, the **Transaction Detailed** report is available

  - Through the **WebGUI tab → ECC System sub-tab** of the **BUworks Central portal** a transactional report is also available:
    - **S_P99_41000147 – Earmark fund journal**

Provider Selection and Contact List

To select a provider click on the Drop Down Menu.

Provider Information

ISR Requ
Provider: *   ▼ PI or Req
Requester Contact Detail: *   Phone Ext: *   PI or Req

Important   Pay close attention to the provider selected as many have similar names. *If the wrong provider is selected a new ISR form is required.

If you have additional questions on estimate charges or on what to include on the ISR form, contact the Provider for any specific details to include.

Internal Service Request Provider Contact Listing

ProvID	Provider Name	E-Mail Address
1	Dining - Retail Dining	rrubini@bu.edu
2	Dining- Questrom Catering	markhes@bu.edu
3	Dining - Catering on the Charles	catering@bu.edu
4	Dining - Residence Hall Dining	stbaldwi@bu.edu
7	Parking Services - Guest Passes	parking@bu.edu
8	Parking Services - Permits	parking@bu.edu
9	Parking Services - Other Services	parking@bu.edu
10	Marketing&Communications - BU Productions (Video Production)	nmarrs@bu.edu
11	Marketing&Communications - Design/Print Comm	csisr@bu.edu
12	Marketing&Commnications - Web/Interactive Design	csisr@bu.edu
13	Marketing&Communications - Photography/Multimedia	csisr@bu.edu
14	Mugar - Copy Services	cathym@bu.edu
15	IS&T - Media Group Krasker Film Library	dasantos@bu.edu
17	IS&T - Media Group Support Services	avsupt@bu.edu
18	IS&T - AV Engineering	kmorley@bu.edu
19	IS&T - Media Group Scanning Services	dasantos@bu.edu
20	IS&T – IT Help Center	jdreiss@bu.edu
21	IS&T - Network Services	networksystemsisr-list@bu.edu
22	IS&T - Systems Operations	ist-isr-sysops@bu.edu
23	IS&T - Systems Engineering	jdebaere@bu.edu
24	IS&T - Applications	janetob@bu.edu
25	IS&T - Project Management	bevguiry@bu.edu
26	IS&T - Communication Services	phone@bu.edu
27	BU Police Dept	margo911@bu.edu
28	Mail Services - Bulk Mail	univms@bu.edu
29	Photonics Center	bethmath@bu.edu
30	BME - Biointerface Technologies (BIT)	fallonf@bu.edu
31	BME - Micro/Nano Biosystems Fabrication (MNBF)	fallonf@bu.edu

Click here for a copy of the ISR Provider contact list or copy and paste this URL to your browser http://www.bu.edu/tech/files/2016/01/ISR-Provider-Listing-with-GL-Recovery-CO.pdf

The ISR Request – Create

* Enter only one Email in this field
(E-mail notification will not generate if multiple email are enter

Provider Information

ISR Request No:

Provider: *

PI/Requester Detail: Extension:

Requester Contact Detail: *   Phone Extension: *   PI/Requester Email: *

Delivery Information

Requested Delivery Date: *

Deliver To Building: *   Rm #: *   For Attention:

Note Pad

<Enter description text here, limit 255 characters>

Requester can include a note to the provider. Note is limited to 255 characters

Reset Note

Charge Distribution

CostObject	Distribution	Object Text
	0.0	
	0.0	
	0.0	
	0.0	

Clear Distribution

Any field with a Red * is a required entry field.

Important * If multiple emails are entered the Requester and ISR Provider will not receive the an email notification.

The ISR Request – Create

** Split distribution by percentage is available; see example below.

Note Pad

Charge Distribution

CostObject	Distribution	Object Text
	0.0	
	0.0	
	0.0	
	0.0	

Reset Note

Clear Distribution

Requested Items

Line Item No	Short Text	* Qty	Order Unit	Net Price	Total Amount	CostObject	Cost Object D...	Change Date	Changed By
00001				0.00	0.00				
00002				0.00	0.00				

New Attachment functionality

Deliver to Building: AMORY STREET Rm #: 102

Note Pad

airfare ---- testing charge distibution

Attachments

File Name

Charge Distribution

Distribution	Object Text	CostObject
40.0	CAS BIOLOGY	1202020000
60.0	CAS CHEMISTRY	1202050000

Requested Items

Line Item No	Short Text	* Qty	Order Unit	Net Price	Total Amo...	CostObject	Cost Object...	Charge A...	Completio...	Change Date	Changed By
00001	airfare for s...	1	each	250.00	250.00			0.00	☐	07/17/2014	BUWTN503

Important

** **Cost Objects** are entered in the **Charge Distribution** area when splitting cost between two or more departments. Any line item without a cost object will default to the charge distribution.

ISR Reporting

The Requester can view the Financial entries generated through the **S_P99_41000147 Earmarked Fund Display** report listing

Access the transaction code through **WebGUI**

SAP Easy Access - Us

Menu ◀ S_P99_410000147

Earmarked funds journal

Menu ◀| [   ] | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... | Program Documentation | Dynamic Selections |

Filter the Report

Document Header Data

Earmarked Funds	[ ] to [ ]	⇒
Doc. Category	[ ] to [ ]	⇒
Document type	94 to 94	⇒
Company Code	TRBU to [ ]	⇒
Document Date	[ ] to [ ]	⇒
Posting Date	[ ] to [ ]	⇒
Created by	[ ] to [ ]	⇒
Costs due on	[ ] to [ ]	⇒

...al File... | Mail Recipient | ABC Analysis | Graphic | Change Layout... | Select Layout... | More...

Line Item Data

Controlling Area	TRBU to [ ]	⇒
G/L Account	[ ] to [ ]	⇒
Cost Center	1202020000 to 1202020000	⇒
Order	[ ] to [ ]	⇒
WBS Element	[ ] to [ ]	⇒
FM Area	TRBU to [ ]	⇒
Commitment Item	[ ] to [ ]	⇒
Funds Center	[ ] to [ ]	⇒
Fund	[ ] to [ ]	⇒
Vendor	[ ] to [ ]	⇒
Customer	[ ] to [ ]	⇒

												Changed	Changed	Changed on	Block
										passes		0.00	0.00	01/13/2012	
										12138		0.00	0.00		
										12425		0.00	0.00		
										g4		0.00	0.00	06/01/2012	
												0.00	0.00	06/28/2012	
										med.		0.00	0.00	05/07/2012	
										s		0.00	0.00	03/09/2012	
										e		0.00	0.00	06/11/2012	
										one ling		0.00	0.00	01/10/2012	
										ement Samsung		0.00	0.00	04/04/2012	
												0.00	0.00	04/04/2012	
										PO Forms		0.00	0.00		
										PASS FOR 1/24,25,26		0.00	0.00	04/06/2012	
										nect		0.00	0.00	02/06/2012	
										s van		0.00	0.00	04/20/2012	
										gram		0.00	0.00	06/01/2012	
												0.00	0.00	04/06/2012	
										h Bullfrogs		0.00	0.00	03/07/2012	
										er forms		0.00	0.00		
										DICE MAIL SERVICE FOR PROFESSOR IAN		0.00	0.00		
										er Form		0.00	0.00		
										n		0.00	0.00		
										Shopping cart		0.00	0.00		
												0.00	0.00		
1202020000		2	30	94	USD	01/15/2013	40.00	510050	0.00	1202020000	40.00	Test 2	0.00	0.00	
1202020000		3	30	94	USD	01/15/2013	130.00	510050	0.00	1202020000	130.00	Test 3	0.00	0.00	
1202020000	9040022800	1	30	94	USD	01/09/2013	150.00	893310	0.00	1202020000	150.00	test	0.00	0.00	
1202020000	9040022801		30	94	USD	01/15/2013	100.00	510050	0.00	1202020000	0.00	Test for Freight	0.00	0.00	
1202020000	9040022802	2	30	94	USD	01/30/2013	25.00	893270	0.00	1202020000	0.00 X 01/30/2013	blanket order support services	0.00	0.00	

ISR Reporting

- The Requester has additional reporting available through BW Reporting: **Finance / Funds Management (Distributed) Reports / Transaction Detail report**

General Variables

Variable	Current Selection	Description
* Posting Date	06/30/2011 - 03/19/20	06/30/2011 - 03/19/2013
Funds Center		
Revenue (2) / Expense (3)		
Funded Program		
Fund Type		
Unit		
Commitment item		
Commitment Vs Actual		
FM Statistical Indicator	#	Real (Budget Relevant)

OK Check

GL/Commitment item		Fiscal Period/Year	ISR Number	FSR Number	Cost Center	Funded Program	Posting date
890100	ISR: CATERING	DEC 2012	9040005252	-	1202050000	FUNDED_PROGRAM_NR	12/21/2011
			9040009061	-	1202050000	FUNDED_PROGRAM_NR	12/16/2011
			9040009405	-	1202050000	FUNDED_PROGRAM_NR	12/21/2011
			9040013422	-	1202050000	FUNDED_PROGRAM_NR	03/29/2012
			9040013423	-	1202050000	FUNDED_PROGRAM_NR	03/29/2012
			9040014104	-	1202050000	FUNDED_PROGRAM_NR	03/19/2012
			9040007986	-	1202050000	FUNDED_PROGRAM_NR	10/28/2011
			9040019699	-	1202050000	FUNDED_PROGRAM_NR	06/12/2012
			9040007986	-	1202050000	FUNDED_PROGRAM_NR	10/28/2011
			9040020057	-	1202050000	FUNDED_PROGRAM_NR	06/26/2012
			9040023184	-	1202050000	9300000850	07/25/2012
			9040023184	-	1202050000	9300000850	07/25/2012
							08/21/2012
		SEP 2013	9040023184	-	1202050000	9300000850	07/25/2012
							09/27/2012
893320	ISR: BUPD	AUG 2013	9040021973	-	1202050000	9300000850	08/01/2012
893610	FMP: CARPENTERS	JUL 2013	-	9060078378	1202050000	FUNDED_PROGRAM_NR	07/13/2012
		SEP 2013	-	9060092155	1202050000	FUNDED_PROGRAM_NR	09/28/2012
893620	FMP: ELECTRICAL	FEB 2012	-	9060039700	1202050000	FUNDED_PROGRAM_NR	02/29/2012
			-	9060048401	1202050000	FUNDED_PROGRAM_NR	02/29/2012

Additional Information

- ISR form is used to request Internal Services from a Boston University internal department.

- Note: Facilities uses their own process. FSR – Facilities Service Request.

- If a ISR form is created in error to the wrong provider. The Provider must close/complete the ISR form to relieve the commitment item.

- The Note Pad field is limited to 255 characters.

- Attachments can be added to the ISR form.

- Once an ISR is submitted an ISR document number is created and funds are encumbered through Funds Reservation.

  - ISR forms cannot be updated.

- No approval process required.

- The Internal Provider receives an e-mail and fulfills the request.

  - Once the ISR is fulfilled (billed against) it triggers the release on reserved funds.

- ISR should be closed before year end or grant ending period to ensure reserved commitment item(s) are released. The Internal Provider is responsible for closing open ISR's.

- To correct a ISR posted entry a journal entry is required.