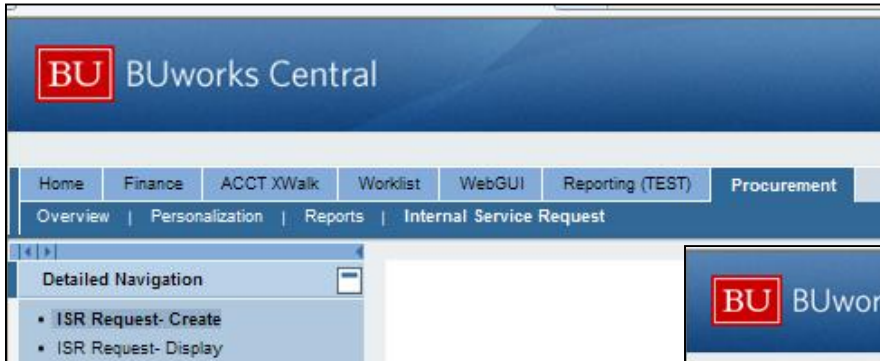


ISR Process for Internal Service Requester



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

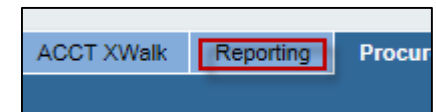
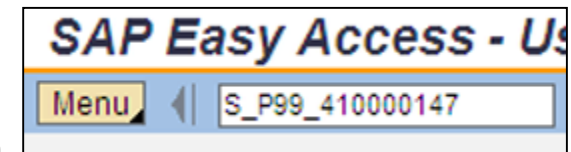


- **Internal Service Request Form - Create**

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:

BUworks Central

Home Finance ACCT XWalk Worklist WebGUI Reporting (TEST) **Procurement**

Overview | Personalization | Reports | Internal Service Request

Detailed Navigation

- ISR Request- Create
- ISR Request- Display
- Facilities Service Request
- BUMC Facilities Service Request

Provider Information

Provider: * ISR Request No:
 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

Charge Distribution

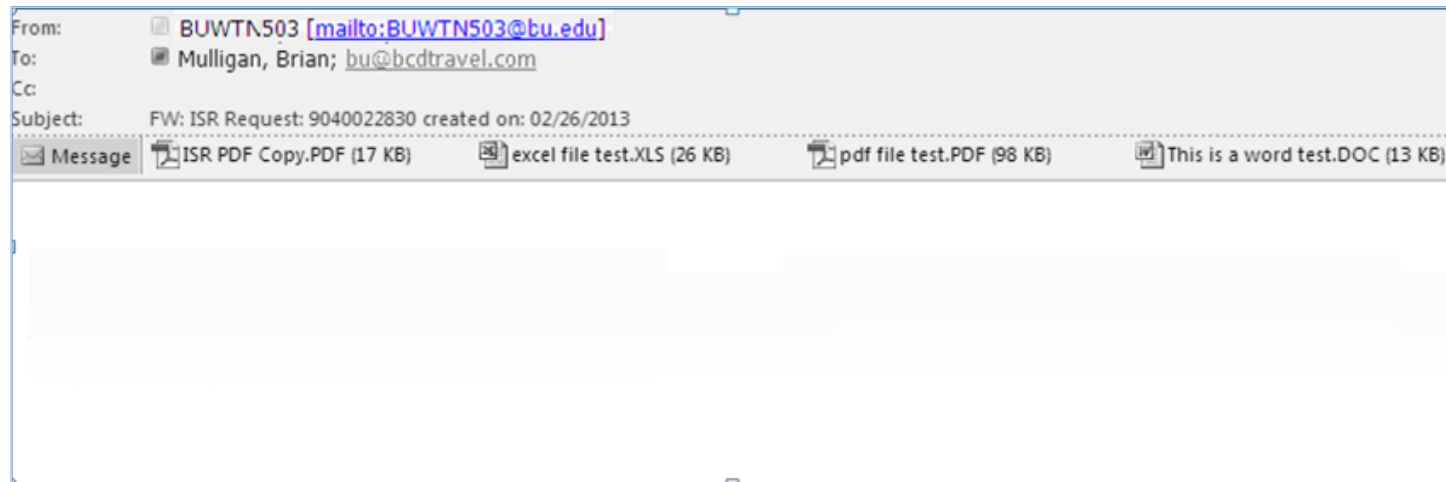
CostObject	Distribution	Object Text
	0.0	
	0.0	
	0.0	
	0.0	

Requested Items

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

Internal Service Request Process Overview

- When the ISR Request is submitted,
the Internal Provider receives an e-mail notification



Note – Only one email address is required.

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.

The image displays two screenshots of the BUworks Central portal interface, illustrating the navigation paths to the Internal Service Request (ISR) Request Display.

Top Screenshot (Procurement Tab):

- The portal header shows the **BU** logo and **BUworks Central**.
- The main navigation bar includes tabs: Home, Employee Self-Service, Manager Self-Service, Payroll Coordinator, Organizational Chart, Finance, ACCT XWalk, Reporting, **Procurement** (highlighted with a red box), and Worklist.
- Below the main navigation bar, the breadcrumb trail shows: Overview | Personalization | TerrierTemps | **Internal Service Request**.
- The left sidebar contains a **Detailed Navigation** section with the following items:
 - ISR Request- Create
 - ISR Request- Display** (highlighted with a red box)
 - Facilities Service Request
- The **Related Links** section includes: Help.

Bottom Screenshot (Finance Tab):

- The portal header shows the **BU** logo and **BUworks Central**.
- The main navigation bar includes tabs: Home, Employee Self-Service, Manager Self-Service, Payroll Coordinator, Organizational Chart, **Finance** (highlighted with a red box), ACCT XWalk, and Repo.
- Below the main navigation bar, the breadcrumb trail shows: **ISR Fulfillment** | Distributed Forms.
- The left sidebar contains a **Detailed Navigation** section with the following items:
 - ISR Request - Fulfillment
 - ISR Request- Display** (highlighted with a red box)
- The **Related Links** section includes: Help.
- The main content area displays the heading **Provider Information**.

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

Provider: * [Dropdown Menu]

Requester Contact Detail: * [Text Field]

Phone Ext: * [Text Field]



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.



Click [here](https://www.bu.edu/bpba/training-resources/internal-service-provider-resources/) for a copy of the ISR Provider contact list or copy and paste this URL to your browser

<https://www.bu.edu/bpba/training-resources/internal-service-provider-resources/>

Internal Service Request Provider Contact Listing

ProvID	Provider Name	E-Mail Address
1	Dining - Retail Dining	mrubin@bu.edu
2	Dining - Questrom Catering	marlhess@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	csir@bu.edu
12	Marketing&Communications - Web/Interactive Design	csir@bu.edu
13	Marketing&Communications - Photography/Multimedia	csir@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	avsupr@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	networksystems@bu.edu
22	IS&T - Systems Operations	ist-ist-sysops@bu.edu
23	IS&T - Systems Engineering	jdebaere@bu.edu
24	IS&T - Applications	janeito@bu.edu
25	IS&T - Project Management	bevquay@bu.edu
26	IS&T - Communication Services	phone@bu.edu
27	BU Police Dept	margo911@bu.edu
28	Mail Services - Bulk Mail	univers@bu.edu
29	Photonics Center	berthman@bu.edu
30	BME - BioInterface Technologies (BIT)	fallonf@bu.edu
31	BME - Micro/Nano Biotechnology (MNB)	fallonf@bu.edu

The ISR Request – Create

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

Provider Information

Provider: *

Requester Contact Detail: * Phone Extension: *

ISR Request No: PIRequester Detail: Extension:

PIRequester Email: *

Delivery Information

Requested Delivery Date: *

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

Note Pad

<Enter description text here, limit 255 characters>

Charge Distribution

CostObject	Distribution	Object Text
	0.0	
	0.0	
	0.0	
	0.0	

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

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



* 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.

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

Attachments

File Name

Deliver to Building: AMORY STREET Rm #: 102

For Attention: You

Note Pad

airfare ---- testing charge distribution

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...	Completi...	Change Date	Changed By
00001	airfare for s...	1	each	250.00	250.00			0.00	<input type="checkbox"/>	07/17/2014	BUWTN503

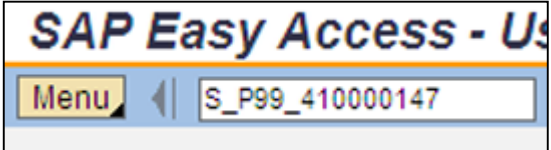
Important

** **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**



Earmarked funds journal

Menu Save as Variant... Back Exit Cancel System Execute Get Variant... Program Documentation Dynamic Selections

Document Header Data

Earmarked Funds	<input type="text"/>	to	<input type="text"/>	
Doc. Category	<input type="text"/>	to	<input type="text"/>	
Document type	94	to	94	
Company Code	TRBU	to	<input type="text"/>	
Document Date	<input type="text"/>	to	<input type="text"/>	
Posting Date	<input type="text"/>	to	<input type="text"/>	
Created by	<input type="text"/>	to	<input type="text"/>	
Costs due on	<input type="text"/>	to	<input type="text"/>	

Line Item Data

Controlling Area	TRBU	to	<input type="text"/>	
G/L Account	<input type="text"/>	to	<input type="text"/>	
Cost Center	1202020000	to	1202020000	
Order	<input type="text"/>	to	<input type="text"/>	
WBS Element	<input type="text"/>	to	<input type="text"/>	
FM Area	TRBU	to	<input type="text"/>	
Commitment Item	<input type="text"/>	to	<input type="text"/>	
Funds Center	<input type="text"/>	to	<input type="text"/>	
Fund	<input type="text"/>	to	<input type="text"/>	
Vendor	<input type="text"/>	to	<input type="text"/>	
Customer	<input type="text"/>	to	<input type="text"/>	

1202020000	2	30	94	USD	01/15/2013	40.00	510050	0.00	1202020000		40.00		Test 2
1202020000	3	30	94	USD	01/15/2013	130.00	510050	0.00	1202020000		130.00		Test 3
1202020000 9040022800	1	30	94	USD	01/09/2013	150.00	893310	0.00	1202020000		150.00		test
1202020000 9040022801	30	94	USD	01/15/2013		100.00	510050	0.00	1202020000		0.00		Test fo
1202020000 9040022802	2	30	94	USD	01/30/2013	25.00	893270	0.00	1202020000		0.00	X	01/30/2013 blank

Filter the Report

File...	Mail Recipient	ABC Analysis	Graphic	Change Layout...	Select Layout...	More...
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			
med.	0.00	0.00	06/28/2012			
ts	0.00	0.00	05/07/2012			
e	0.00	0.00	03/09/2012			
one ling	0.00	0.00	06/11/2012			
ement Samsung	0.00	0.00	01/10/2012			
	0.00	0.00	04/04/2012			
PO Forms	0.00	0.00				
T PASS FOR 1/24,25,26	0.00	0.00	04/06/2012			
nect	0.00	0.00	02/06/2012			
van	0.00	0.00	04/20/2012			
gram	0.00	0.00	06/01/2012			
s	0.00	0.00	04/06/2012			
n 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				
	0.00	0.00				
	0.00	0.00				
or Freight	0.00	0.00				
et 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 ^{LT}	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 ^Δ	Fiscal Period/Year ^Δ	ISR Number ^Δ	FSR Number ^Δ	Cost Center ^Δ	Funded Program ^Δ	Posting date ^Δ
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
893320 ISR: BUPD	SEP 2013	9040023184	-	1202050000	9300000850	07/25/2012
		9040023184	-	1202050000	9300000850	07/25/2012
						08/21/2012
						07/25/2012
						09/27/2012
		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.