

**Introduction**

**Description**

Internal Service Requests (ISR's) and Facilities Service Requests (FSR's) are transactions involving providers internal to Boston University. These transactions are easy to identify using either a Funds Management or Grants Management Business Warehouse report. This Help Guide describes the steps involved.

**Prerequisites**

The steps below assume you are familiar with both running a BW report and applying a filter.

**Tips and Tricks**

- None

**Referenced Help Guides**

- [BW How to - Filter Report Data - PDF or video](#)
- [BW How to - Add, Remove, or Move a Column of Data](#)

**Procedure**

The procedure varies depending upon whether one uses a Funds Management (FM) or Grants Management (GM) report.

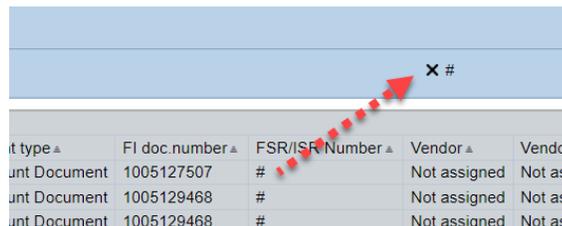
**Funds Management**

1. Run one of these reports:

Folder	Report
Funds Management (Distributed)	<i>Transaction Detail</i> <i>Transaction Detail w/ Payroll Detail</i>

2. **FSR/ISR Number** is among the columns of data displayed initially. This column contains two types of data. If a transaction involves an ISR or FSR, an associated FSR/ISR number will be visible. Otherwise, the field will contain a null character (“#”). To view FSR/ISR transactions, therefore, filter the column to exclude any null characters.

The simplest way to do this is to click on any one of the null characters and drag it out of the report area (this is the shortcut form of applying an exclusive filter).



This results in the display of only FSR/ISR numbers.

Document type	FI doc.number	FSR/ISR Number	Vendor	Vendor
Srv Prov	1005195963	9040168807	Not assigned	Not assi
Srv Prov	1005301789	9040169342	Not assigned	Not assi
Srv Prov	1005381038	9040170833	Not assigned	Not assi
ined	Not assigned	9040176648	Not assigned	Not assi

After applying the filter, you may want to organize your report data by service provider. The text portion of the **GL/Commitment Item** field contains the provider name. [This video](#) describes how to organize report data based on column position.

**Grants Management**

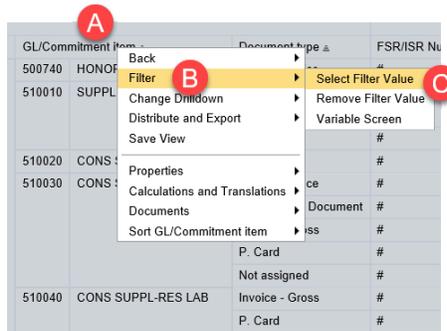
Folder	Report
Grants Management (Distributed)	<i>Grant Document for Expenditures</i> <i>Grant Document for Commitments</i>

The procedure for identifying ISR’s and FSR’s using this GM report is neither as simple nor as definitive as that used with the Funds Management reports. For that reason, if you have access to FM reports, it is recommended that you use that method.

If you cannot use an FM report, run the GM *Grant Document for Expenditures* report<sup>1</sup>. Most, but not all, ISR’s and FSR’s have an assigned GL that begins with “89”.

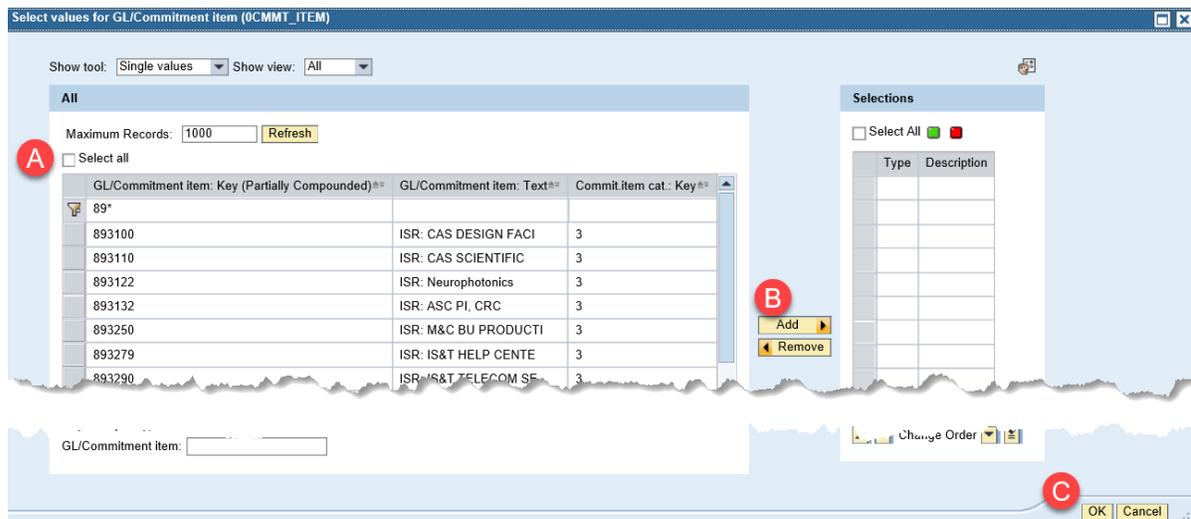
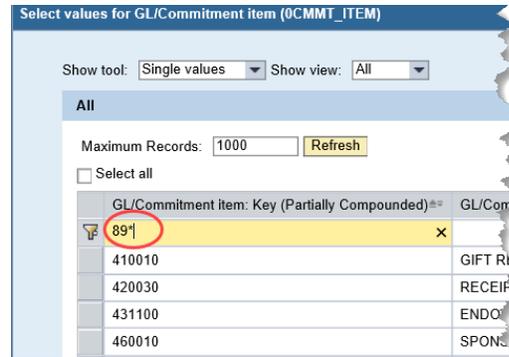
1. Filter the **GL/Commitment Item** column:

- A. Right-click on the column header to display a context menu
- B. Slide your cursor to Filter, then move right
- C. Click on *Select Filter Value*



<sup>1</sup> This report will display ISR/FSR activity only for expenditures. To view activity for commitments, run the *Grant Document for Commitments* report and follow this same procedure.

- Enter “89\*” (no quotes) in the **Key** column on the filter line.
- Then press the **Enter** key on your keyboard or click the **Refresh** button to search for all GL/Commitment Items beginning with 89.



- Select all items in the resulting list by using the **Select All** checkbox (A) or clicking to select each line individually.
- Click the **Add** button to move the selected items to the **Selections** column.
- Press **OK** to activate the filter (C).

GL/Commitment item	Text	Commit.item cat.	Key
893480	ISR: ASC Sp Srv CRC		
893610	FMP: CARPENTERS		
893620	FMP: ELECTRICAL		
893650	FMP: PLUMBING/ HEATI		
893660	FMP: LOCK		
893680	FMP: TRUCKING		
893480	ISR: ASC Sp Srv CRC		
893485	ISR: ASC Sp Srv BUMC		
893279	ISR: IS&T HELP CENTE		

The resulting list will contain only GL/Commitment items that begin with “89.”

As noted previously, this method will identify most ISR’s and FSR’s. A few service centers use a GL that begins with “88.” To be safe, you may want to repeat this procedure using this number to determine if any of these centers are included in your data.

As with the method described for Funds Management reports, you may want to organize your report data by service provider. The text portion of the **GL/Commitment Item** field contains the provider name. [This video](#) describes how to organize report data based on column position.