



# Financial Transaction System (FiTS) - IVs

The IV module of the Financial Transactions System (FiTS) allows Service departments (funds beginning with 19) to bill for goods and services provided to other departmental FOAPs (Fund-Organization-Account-Program), where the Fund, Organization, and Account fields are 6-digit codes and the Program field is a 2-digit code.

After submission, the system will load the IV to Banner. Transaction tracking, archiving, and retrieving of information related to the IV is managed within the system as well.

FiTS replaces the IV templates that are normally submitted through the Gateway system.

FiTS allows a Service department to do the following:

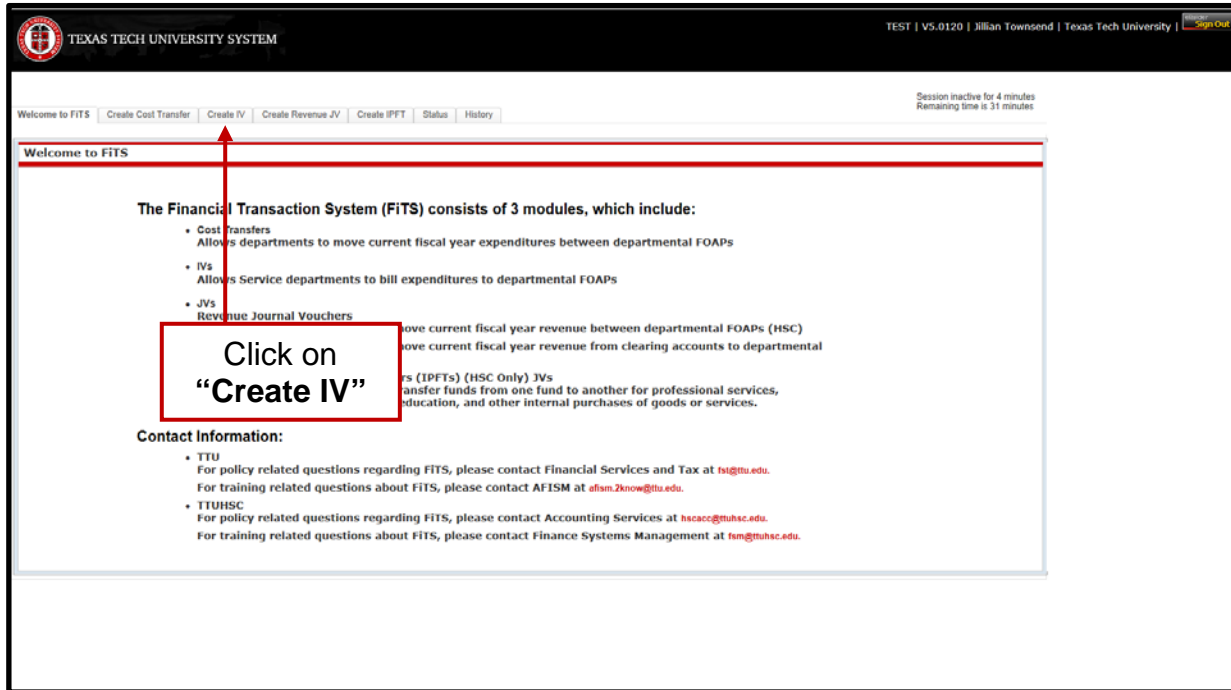
- Start an IV
- Resume completion of an IV
- Submit an IV
- Review the Status of an IV
- Review the History of an IV

FiTS can be accessed from the WebRaider portal, F & A Work Tools tab, Finance Channel under Accounting Services.

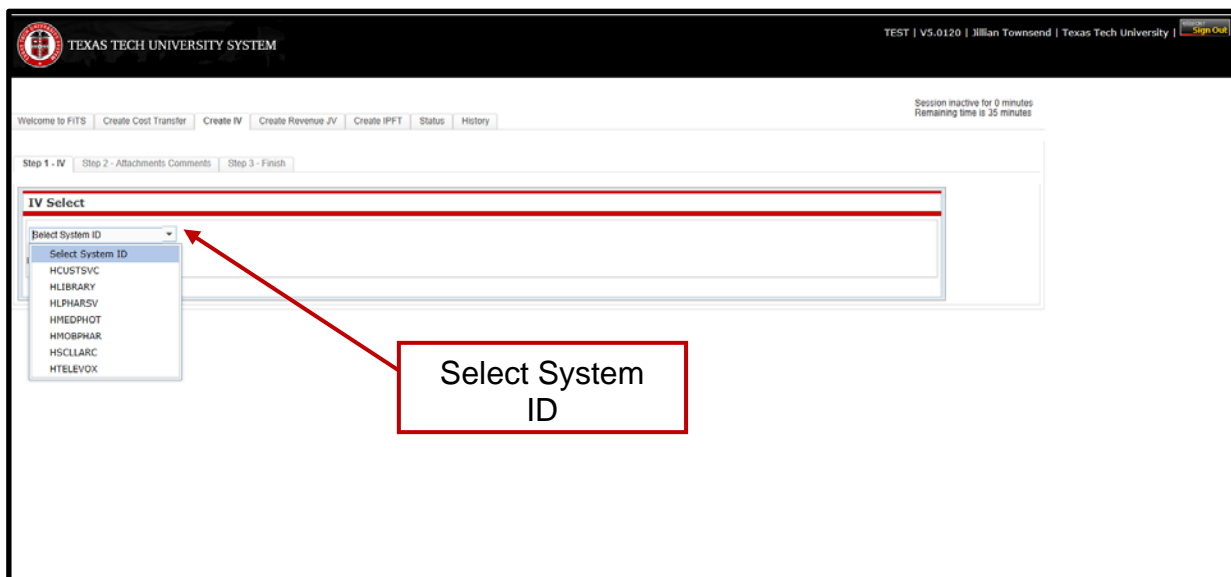
The screenshot displays the WebRaider portal interface. At the top, the header includes the university logo and name, a user welcome message, and navigation icons. The main content area is divided into several columns: Human Resources, Budget, Finance, and Purchasing/Payment Services. The 'Finance' column is expanded, showing 'Accounting Services' with a sub-link for 'Financial Transaction System (FiTS)'. A red box highlights this link, and a red arrow points to it from a text box that reads: "Click on 'Financial Transaction System (FiTS)'".

## Creating an IV

To begin an IV, click on the **“Create IV”** tab at the top of the webpage.

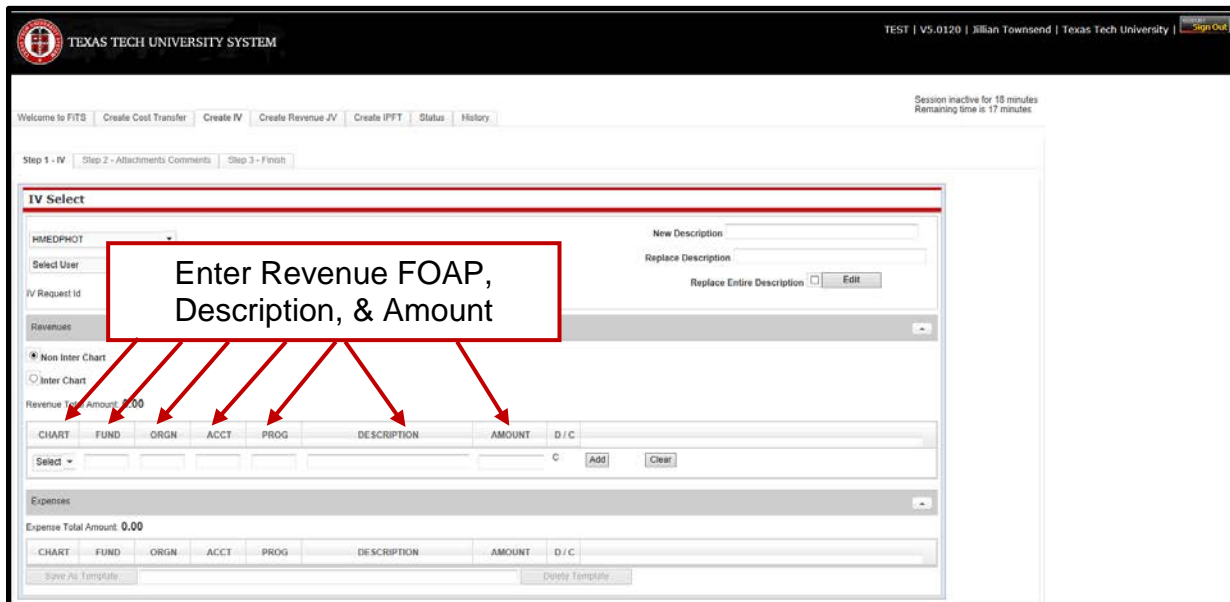


Select the System ID you would like to bill on from the drop down box labeled “Select System ID”. This drop down box will be populated with all System IDs that you are currently authorized to use to bill.



Once a System ID is selected, the screen will display the “Revenues” and “Expenses” sections where the service billing information can be entered. In the “Revenues” section the “Non Inter Chart” radio button signifies that all the expense lines will be on Chart H FOPs. The “Inter Chart” radio button signifies that at least one expense line will be on a chart other than H.

The “Non Inter Chart” radio button is automatically selected by the system. Before this can be changed, a revenue line must be entered. Select the appropriate chart and enter the revenue FOAP, description, and amount.



IV Select

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 0.00

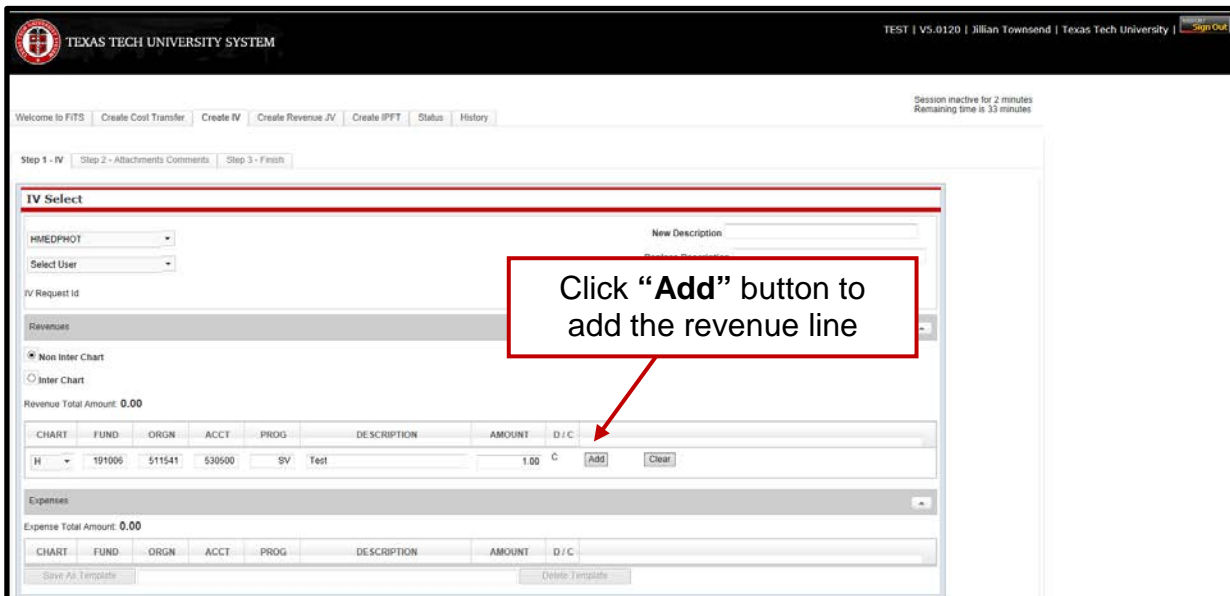
CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
Select							C

Expenses

Expense Total Amount: 0.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C

Click the “**Add**” button to add the revenue line to your service billing.



IV Select

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 0.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	191006	511541	530500	SV	Test	1.00	C

Expenses

Expense Total Amount: 0.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C



After the revenue line is added, an IV Request ID (FiTS ID) is assigned. The FiTS ID can be used to track your IV in the “Status” and “History” tabs.

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TEST | V5.0120 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FiTS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 4 minutes  
Remaining time is 31 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

### IV Select

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]

IV Request Id **IV000096**

New Description: [Text Field]  
Replace Description: [Text Field]  
Replace Entire Description  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 1.00Credits do not equal the Debits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	SV	Test	1.00	C	<a href="#">Edit</a> <a href="#">Delete</a>
H							C	<a href="#">Add</a> <a href="#">Clear</a>

Expenses

At this time, or at any time during the data entry, if your service billing needs to include Inter Chart expenses, the “Inter Chart” radio button can be selected.

After you have entered the revenue line for your billing, you can continue to the “Expenses” section of the IV. In this section, you will enter each department FOAP that you will be charging for goods or services provided. Enter the FOAP, description of expense, and amount to be billed in the respective fields.

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Welcome to FiTS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 8 minutes  
Remaining time is 27 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

### IV Select

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]

IV Request Id IV000096

New Description: [Text Field]  
Replace Description: [Text Field]  
Replace Entire Description  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 1.00Credits do not equal the Debits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	19							<a href="#">Edit</a> <a href="#">Delete</a>
H								<a href="#">Add</a> <a href="#">Clear</a>

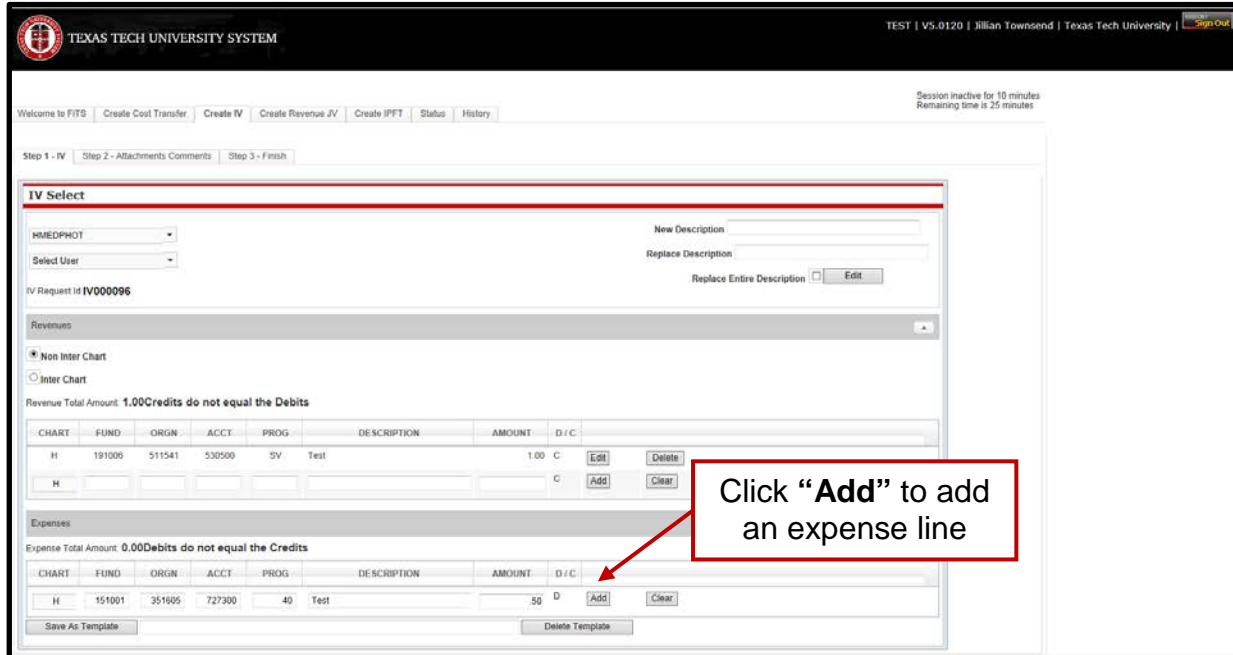
Expenses

Expense Total Amount: 0.00Debits do not equal the Credits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H							D	<a href="#">Add</a> <a href="#">Clear</a>

[Save As Template](#) [Delete Template](#)

Click the **“Add”** button to add the expense line to your service billing. Continue adding lines until all of the departmental FOAPs you are billing have been added.



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Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

Session inactive for 10 minutes  
Remaining time is 25 minutes

**IV Select**

HMEDPHOT: [Dropdown]  
New Description: [Text Field]  
Selected User: [Dropdown]  
Replace Description: [Text Field]  
IV Request ID: IV000096  
Replace Entire Description:  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 1.00 Credits do not equal the Debits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	5V	Test	1.00	C	<a href="#">Edit</a> <a href="#">Delete</a>
H							C	<a href="#">Add</a> <a href="#">Clear</a>

Expenses

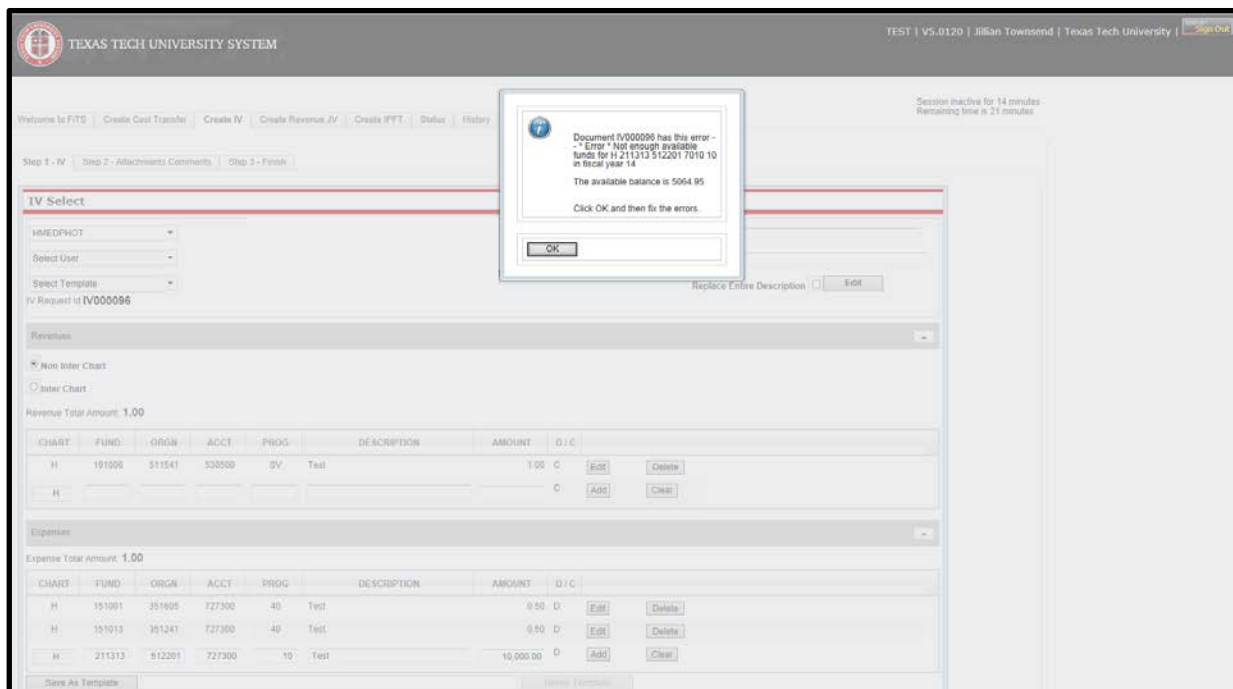
Expense Total Amount: 0.00 Debits do not equal the Credits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	727300	40	Test	50	D	<a href="#">Add</a> <a href="#">Clear</a>

[Save As Template](#) [Delete Template](#)

Click **“Add”** to add an expense line

When adding expense FOAPs to your billing, the system will notify you of FOAPs that do not have available budget to cover the amount you are billing by displaying the following error when you try to **“Add”** the line.



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Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

Session inactive for 14 minutes  
Remaining time is 21 minutes

**IV Select**

HMEDPHOT: [Dropdown]  
Selected User: [Dropdown]  
Select Template: [Dropdown]  
IV Request ID: IV000096  
Replace Entire Description:  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 1.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	5V	Test	1.00	C	<a href="#">Edit</a> <a href="#">Delete</a>
H							C	<a href="#">Add</a> <a href="#">Clear</a>

Expenses

Expense Total Amount: 1.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	727300	40	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
H	151013	351241	727300	40	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
H	211313	512201	727300	10	Test	10,000.00	D	<a href="#">Add</a> <a href="#">Clear</a>

[Save As Template](#) [Delete Template](#)

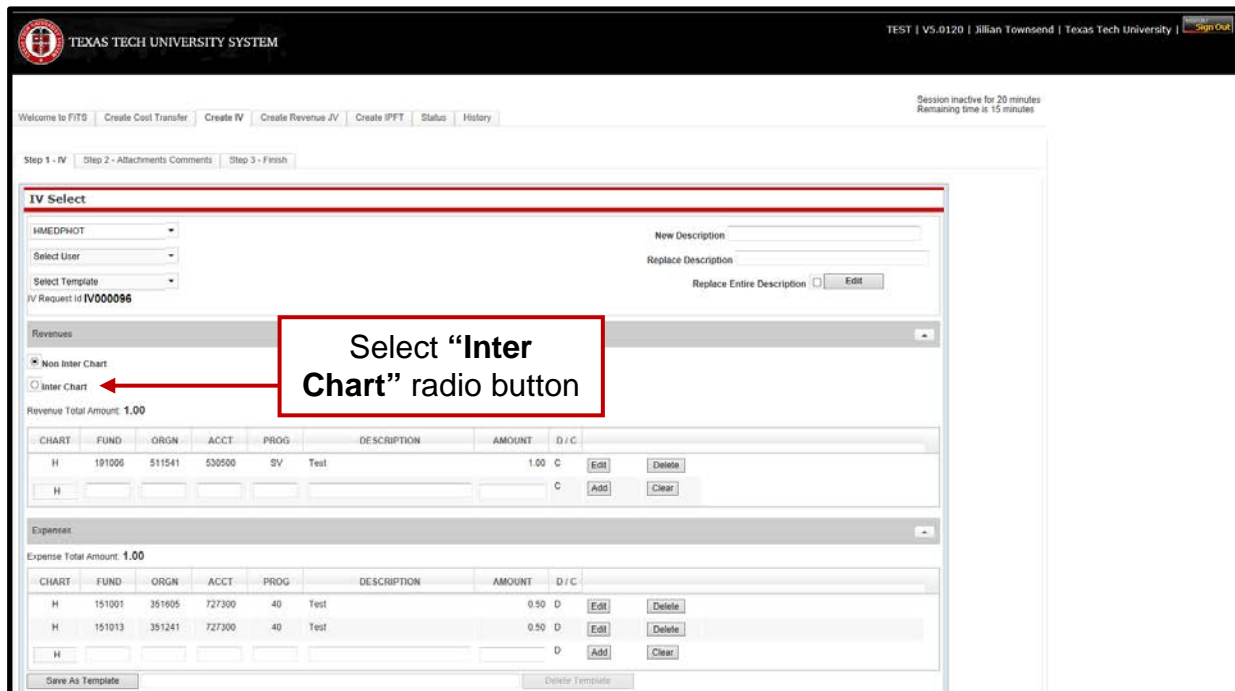
Document IV000096 has this error -  
\* Error \* Not enough available funds for H 211313 512201 7010 10 in fiscal year 14.  
The available balance is 5064.95.  
Click OK and then fix the errors.

[OK](#)

If you receive a budget error, the popup message will indicate the FOAP with the error. You will need to contact the department responsible for the FOAP and request a Budget Revision (BR) be submitted through the online Budget Revision System to budget funds in the proper Budget Account Code (BAC) in order for the line to be added. The FOAP cannot be added to the IV until the BR has been processed and there is sufficient budget to cover the expense.

Non Inter Chart and Inter Chart expense FOAPs can be combined on one service billing IV.

In order to add Inter Chart expense lines to the billing, you must select the **“Inter Chart”** radio button.



The screenshot shows the 'IV Select' interface in the Texas Tech University System. The 'Revenues' section has two radio buttons: 'Non Inter Chart' and 'Inter Chart'. The 'Inter Chart' radio button is selected and highlighted with a red box. A red arrow points from the text 'Select “Inter Chart” radio button' to this radio button. Below the radio buttons, there are tables for 'Revenues' and 'Expenses' with columns for CHART, FUND, ORGN, ACCT, PROG, DESCRIPTION, AMOUNT, and D/C. The 'Revenues' table has one row with CHART 'H', FUND '191006', ORGN '511541', ACCT '530500', PROG 'SV', DESCRIPTION 'Test', and AMOUNT '1.00'. The 'Expenses' table has two rows with CHART 'H', FUND '151001' and '151013', ORGN '351605' and '351241', ACCT '727300', PROG '40', DESCRIPTION 'Test', and AMOUNT '0.50'.

Once the **“Inter Chart”** radio button has been selected, you can begin entering the Inter Chart expense FOAPs.

To add an “Inter Chart” expense line, you will first need to select the chart that corresponds to the FOAP you are billing. You can then enter the **“Inter Chart”** expense FOAP, description, and amount.

When an “Inter Chart” expense line is added, a revenue line will be automatically added to the “Revenues” section of the IV. This is done in order to apply the correct rule codes (HX6 or HX9) to the entry behind the scenes depending on which chart(s) are being billed.



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Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 28 minutes  
Remaining time is 7 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

### IV Select

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]  
Select Template: [Dropdown]  
IV Request Id: **IV000096**

New Description: [Text Field]  
Replace Description: [Text Field]  
Replace Entire Description:  [Edit](#)

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: **2.00**

CHART	FUND	ORGN	ACCT	PRDG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	SV	Test	1.00	C	<a href="#">Edit</a>
H	191006	511541	530500	SV	INTER CHART T - IV000096	1.00	C	<a href="#">Edit</a>

Expenses

Expense Total Amount: **2.00**

CHART	FUND	ORGN	ACCT	PRDG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	727300	40	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
H	151013	351241	727300	40	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
T	16A050	859000	7H0026	100	Test	1.00	D	<a href="#">Edit</a> <a href="#">Delete</a>

Select: [Dropdown] [Add](#) [Clear](#)

[Save As Template](#) [Delete Template](#)

Corresponding "Inter Chart" Revenue & Expense lines

The revenue line(s) will be automatically adjusted as you add "Inter Chart" expense lines to the billing so that the total of the "Inter Chart" revenue lines equals the total amount of all of the "Inter Chart" expense lines.

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Session inactive for 28 minutes  
Remaining time is 27 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

### IV Select

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]  
Select Template: [Dropdown]  
IV Request Id: **IV000096**

New Description: [Text Field]  
Replace Description: [Text Field]  
Replace Entire Description:  [Edit](#)

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: **3.50**

CHART	FUND	ORGN	ACCT	PRDG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	SV	Test	1.00	C	<a href="#">Edit</a>
H	191006	511541	530500	SV	INTER CHART T - IV000096	2.00	C	<a href="#">Edit</a>
H	191006	511541	530500	SV	INTER CHART S - IV000096	0.50	C	<a href="#">Edit</a>

Expenses

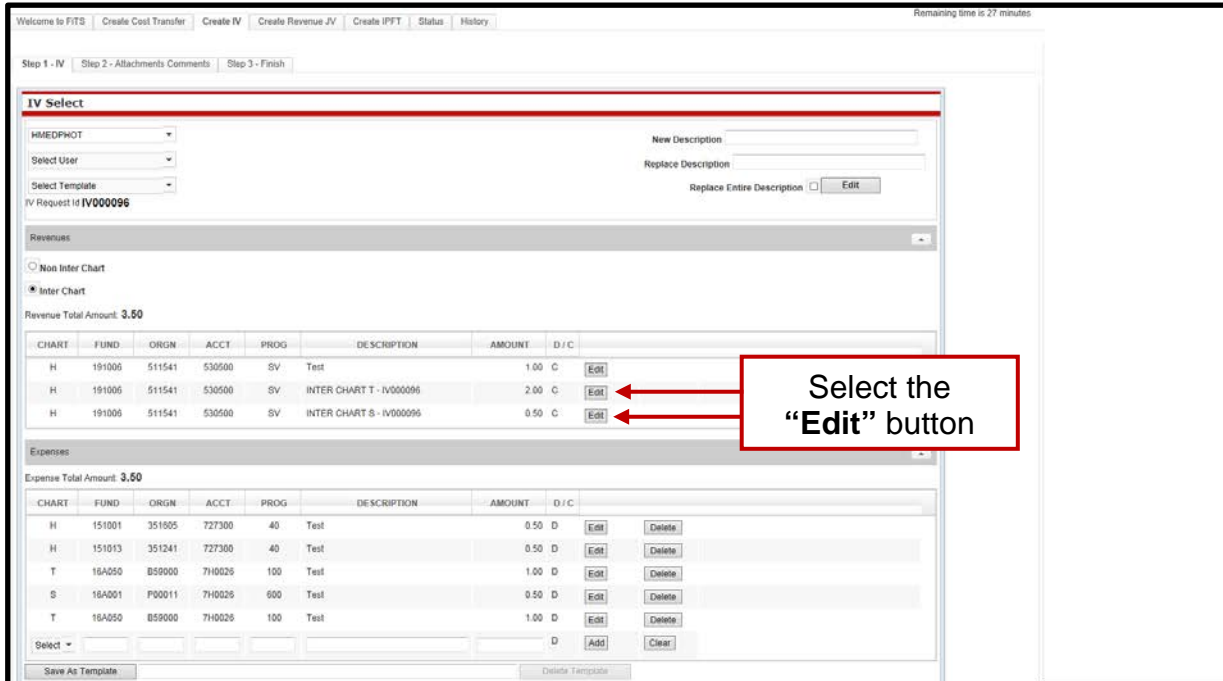
Expense Total Amount: **3.50**

CHART	FUND	ORGN	ACCT	PRDG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	727300	40	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
H	151013	351241	727300	40	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
T	16A050	859000	7H0026	100	Test	1.00	D	<a href="#">Edit</a> <a href="#">Delete</a>
S	16A001	P00011	7H0026	600	Test	0.50	D	<a href="#">Edit</a> <a href="#">Delete</a>
T	16A050	859000	7H0026	100	Test	1.00	D	<a href="#">Edit</a> <a href="#">Delete</a>

Select: [Dropdown] [Add](#) [Clear](#)

[Save As Template](#) [Delete Template](#)

The “Inter Chart” revenue line(s) are automatically given a system generated description referencing the chart that is being billed, along with the FITS ID number of the IV. This description can easily be changed, if needed, using the “Edit” button to the right of the revenue line(s).



Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History | Remaining time is 27 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]  
Select Template: [Dropdown]  
IV Request Id: IV000096

New Description: [Text Field]  
Replace Description: [Text Field]  
Replace Entire Description:  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 3.50

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	SV	Test	1.00	C	Edit
H	191006	511541	530500	SV	INTER CHART T - IV000096	2.00	C	Edit
H	191006	511541	530500	SV	INTER CHART S - IV000096	0.50	C	Edit

Expenses

Expense Total Amount: 3.50

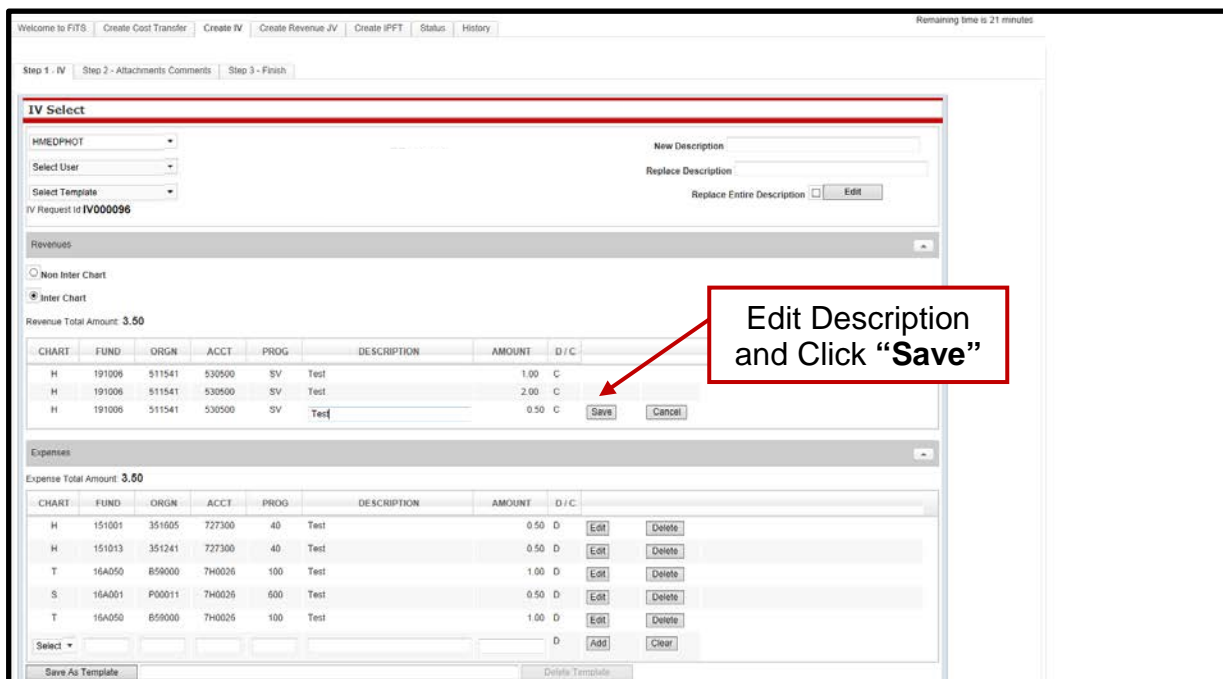
CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	727300	40	Test	0.50	D	Edit Delete
H	151013	351241	727300	40	Test	0.50	D	Edit Delete
T	16A050	859000	7H0026	100	Test	1.00	D	Edit Delete
S	16A001	P00011	7H0026	600	Test	0.50	D	Edit Delete
T	16A050	859000	7H0026	100	Test	1.00	D	Edit Delete

Select: [Dropdown] [Add] [Clear]

Save As Template | Delete Template

Select the “Edit” button

One you have edited the description, click the “Save” button.



Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History | Remaining time is 21 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]  
Select Template: [Dropdown]  
IV Request Id: IV000096

New Description: [Text Field]  
Replace Description: [Text Field]  
Replace Entire Description:  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 3.50

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191006	511541	530500	SV	Test	1.00	C	
H	191006	511541	530500	SV	Test	2.00	C	
H	191006	511541	530500	SV	Test	0.50	C	Save Cancel

Expenses

Expense Total Amount: 3.50

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	727300	40	Test	0.50	D	Edit Delete
H	151013	351241	727300	40	Test	0.50	D	Edit Delete
T	16A050	859000	7H0026	100	Test	1.00	D	Edit Delete
S	16A001	P00011	7H0026	600	Test	0.50	D	Edit Delete
T	16A050	859000	7H0026	100	Test	1.00	D	Edit Delete

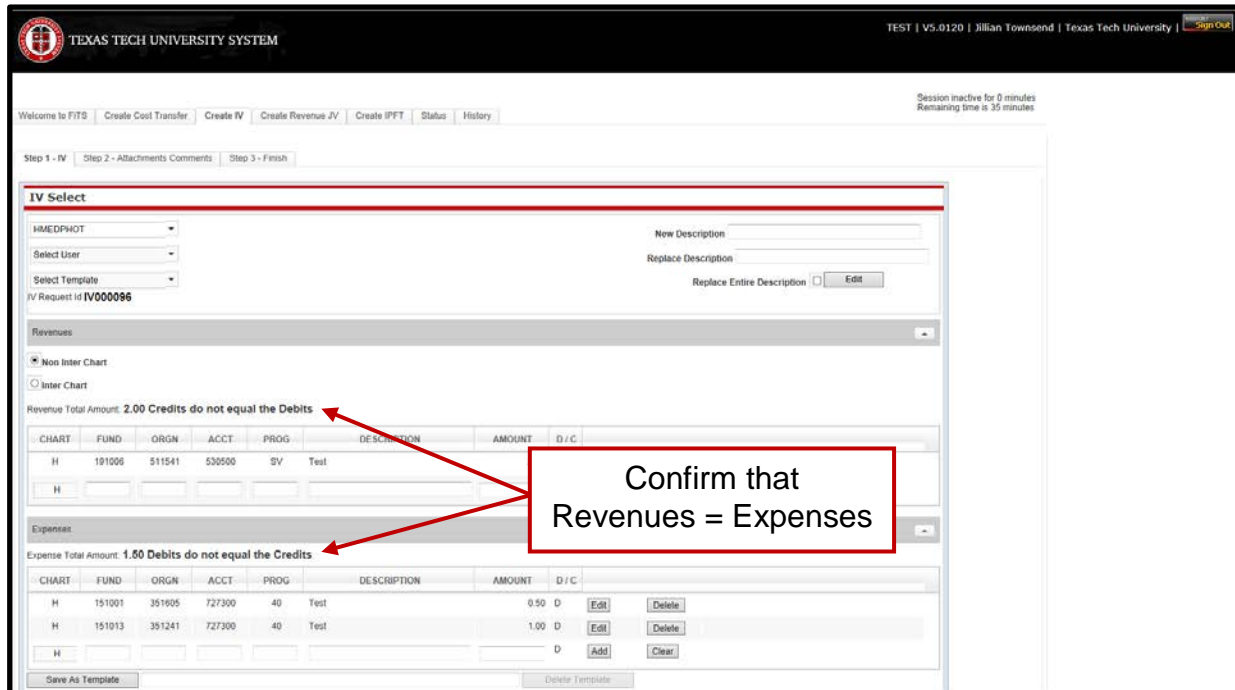
Select: [Dropdown] [Add] [Clear]

Save As Template | Delete Template

Edit Description and Click “Save”



Once you have entered all of the necessary revenue and expense lines to complete your service billing, you will need to make sure that the Revenue Total Amount (Credits) equals the Expense Total Amount (Debits). If they do not equal, you will see the following message.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

Session inactive for 0 minutes  
Remaining time is 35 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]  
Select Template: [Dropdown]  
IV Request Id: IV000096

New Description: [Text]  
Replace Description: [Text]  
Replace Entire Description:  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 2.00 Credits do not equal the Debits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	191006	511541	530500	SV	Test		
H							

Expenses

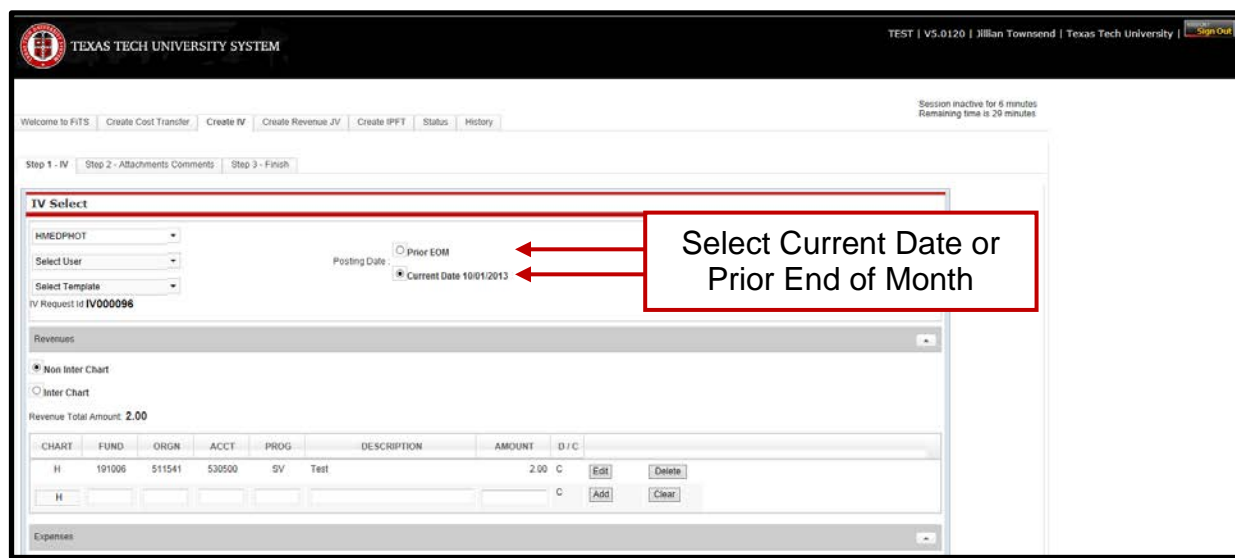
Expense Total Amount: 1.50 Debits do not equal the Credits

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	151001	351605	727300	40	Test	0.50	D
H	151013	351241	727300	40	Test	1.00	D
H							

Save As Template | Delete Template

**Confirm that Revenues = Expenses**

If you are billing during the 10 day period at the beginning of a month, you will have the option to back date the billing in order for it to be posted in the prior month. You will need to select either the “Prior EOM” (End of Month) or “Current Date” radio button.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

Session inactive for 6 minutes  
Remaining time is 29 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [Dropdown]  
Select User: [Dropdown]  
Select Template: [Dropdown]  
IV Request Id: IV000096

Posting Date:  Prior EOM  Current Date 10/01/2013

Revenues

Non Inter Chart  
 Inter Chart

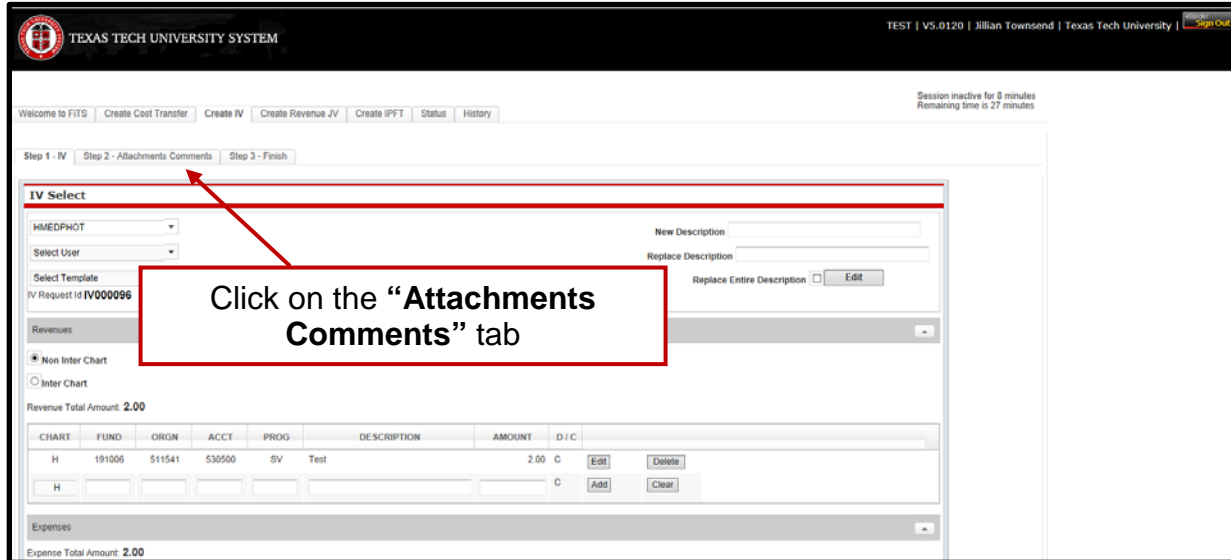
Revenue Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	191006	511541	530500	SV	Test	2.00	C
H							

Expenses

**Select Current Date or Prior End of Month**

Once you have confirmed the Revenue Total Amount is equal to the Expense Total Amount, you can continue to the **“Step 2 – Attachments Comments”** tab.



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Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 27 minutes

Step 1 - IV | **Step 2 - Attachments Comments** | Step 3 - Finish

**IV Select**

HMEDPHOT  
Select User  
Select Template  
IV Request to IV000096

New Description  
Replace Description  
Replace Entire Description  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 2.00

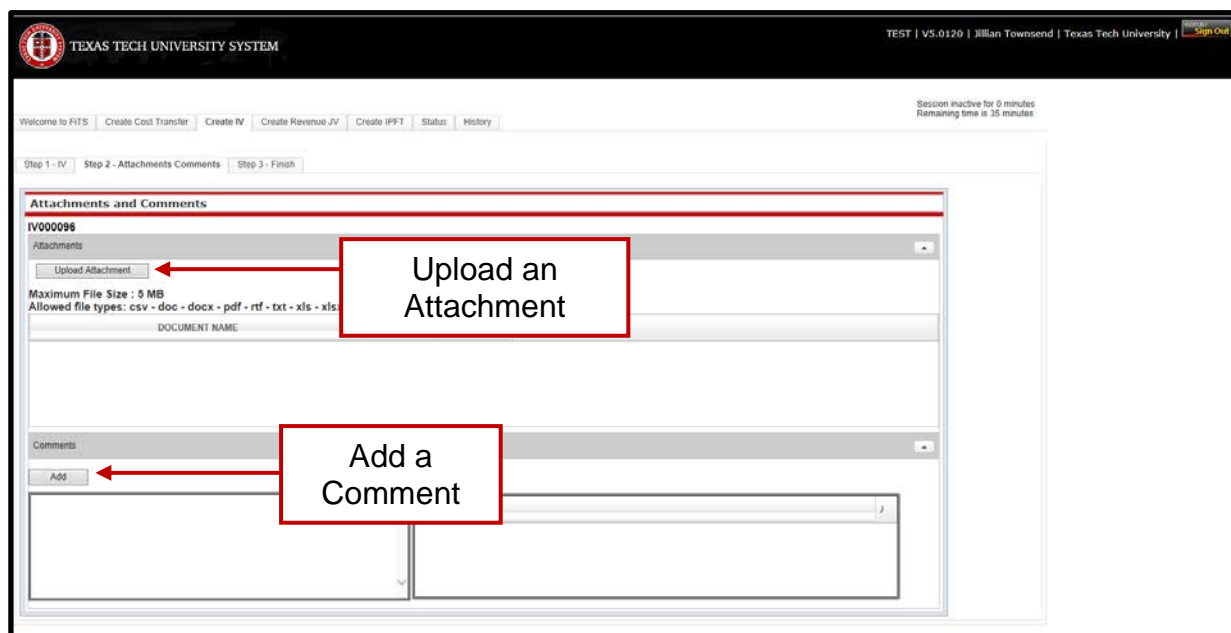
CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	191006	511541	530500	SV	Test	2.00	C

Expenses

Expense Total Amount: 2.00

In the “Attachments” section, you can upload attachment(s) (in one of the allowed file types) to provide additional information regarding the IV if needed.

To add a comment, type the text into the box, then click the “Add” button to save the comment.



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TEST | V5.0120 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 35 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**Attachments and Comments**

IV000096

Attachments

Upload Attachment

Maximum File Size : 5 MB  
Allowed file types: csv - doc - docx - pdf - rtf - txt - xls - xlsx

DOCUMENT NAME

Comments

Add



Once you have added any optional attachments or comments you can move to the final tab, “**Step 3 - Finish**”. The “**Step 3 - Finish**” tab allows you to perform a variety of different tasks. They are:

- Started and will mark Complete later
  - o Clicking this button saves your progress but will not mark the IV as complete.
  - o Once clicked, it will take you back to a blank “**Step 1 - IV**” tab to begin a new IV if desired.
  - o To mark the IV as Complete after clicking this option, search for the IV in the “**Status**” tab (instructions located below).
- Mark as Complete
  - o Clicking this button marks the IV as complete in the system, but will not submit the IV for processing.
  - o To submit the IV for processing after clicking this option, search for the IV in the “**Status**” tab (instructions located below).
- Submit For Processing
  - o Clicking this button will send the IV for processing through Gateway.

If you select “**Mark as Complete**”, this does not send the IV for processing. In order to send the IV for processing, navigate to the “**Status**” tab and locate your IV by the FiTS ID. Once located, select the “**Submit**” button.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 2 minutes  
Remaining time is 33 minutes

**Status**

Chart: Select Chart | Fund | Orgn | User | [Clear User](#)

Date from: | Date to: | [Clear Dates](#)

FITS ID | [Search](#) | [Clear Search](#)

Select a Document Type:  ALL  CT  IV  RT  OPT

Select the number of rows to display:  5  10  25  50  100

**Your FITS Documents**

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY			
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	<a href="#">Review</a>		
CT001376	Submitted	Jillian Townsend	01 / 30 / 2014	Jillian Townsend	<a href="#">Review</a>		
IV000096	Completed	Jillian Townsend	02 / 24 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Submit</a>
PT000095	Submitted	Michael Crowder	02 / 18 / 2014	Michael Crowder	<a href="#">Review</a>		
RT000124	Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>	
RT000125	Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>	

Select "Submit"

## Confirmation of Posting

After the IV has been submitted for processing, you can navigate to the “**Status**” tab to confirm that the IV has posted with no errors. If the IV is not present in the “**Status**” tab, the IV has successfully posted through Gateway. If the IV remains in the “**Status**” tab, it will have an error to the right stating “Errors in Gateway – Review Eprint”.

TEXAS TECH UNIVERSITY SYSTEM

TEST | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 2 minutes  
Remaining time is 33 minutes

**Status**

Chart: Select Chart | Fund | Orgn | User | [Clear User](#)

Date from: | Date to: | [Clear Dates](#)

FITS ID | [Search](#) | [Clear Search](#)

Select a Document Type:  ALL  CT  IV  JV

Select the number of rows to display:  5  10  25  50  100

**Your FITS Documents**

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY			
CT000328	Submitted	Ricky Baker	05 / 23 / 2013	Ricky Baker	<a href="#">Review</a>		
CT000332	Submitted	Jillian Townsend	05 / 22 / 2013	Jillian Townsend	<a href="#">Review</a>		
CT000336	Submitted	Jillian Townsend	05 / 22 / 2013	Jillian Townsend	<a href="#">Review</a>		
CT000358	Submitted	Ricky Baker	05 / 21 / 2013	Ricky Baker	<a href="#">Review</a>		
CT000373	Submitted	Jillian Townsend	08 / 19 / 2013	Jillian Townsend	<a href="#">Review</a>		
CT000396	Submitted	Ricky Baker	06 / 17 / 2013	Ricky Baker	<a href="#">Review</a>		
CT000407	Submitted	Ricky Baker	06 / 20 / 2013	Ricky Baker	<a href="#">Review</a>		
CT000456	Submitted	Jillian Townsend	09 / 17 / 2013	Jillian Townsend	<a href="#">Review</a>		
CT000457	Errors	Jillian Townsend	09 / 16 / 2013	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>	Errors in Gateway - Review Eprint
IV000162	Completed	Jillian Townsend	09 / 24 / 2013	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Submit</a>

Error Message



If an error message is shown in the “**Status**” tab for the IV that was submitted, you can access the ePrint report in order to determine the specific reason for the error.

If the IV has successfully posted, you can access the ePrint report to determine the Document ID given for the service billing.

You can access ePrint reports from the Webraider Portal on the F & A Work Tools tab under Finance Systems Management. Sign into ePrint using your Oracle User ID and password and select the GateWay TTUSPRD repository. Once in ePrint, locate your System ID and click on the drill icon. All of the IVs loaded under this System ID will be displayed. Select the desired report(s).

The **day after** you submit your IV, access Cognos from the Webraider Portal on the F & A Work Tools tab. Click on Cognos Connection in the Finance Channel.

Once in Cognos, click on IBM Cognos Content in the My Content Section. Go to HSC Finance > Transaction Detail > Operating Ledger Transaction Search Query.

Choose the Begin and End Fiscal Periods (FP) that include the transaction date of your billing. In the Document field, enter the Doc ID that was generated when the billing was uploaded. You can see each line of the documents for the date range that you queried after the report has ran. Once run, the report will open as an Excel document.

\*FiTS currently has restrictions placed on all IV billings. Only IVs crediting (C) the Service Department (19XXXX) and debiting (D) the other funds to be charged will be allowed to load.

Any reversals required will need to be submitted to the Accounting Services department at [AccountingElp@ttuhsc.edu](mailto:AccountingElp@ttuhsc.edu). When requesting the reversal, the following documentation will need to be included in the request:

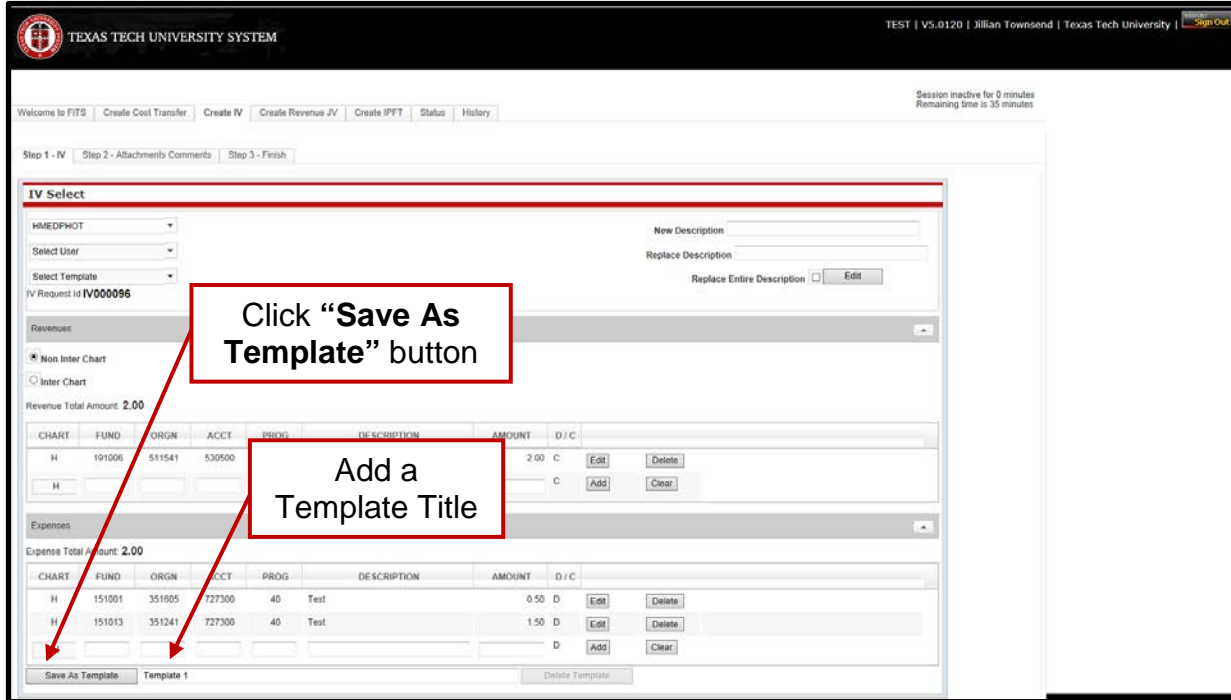
- A copy of the original ePrint report of the billing to be reversed
- If a partial reversal is needed, you must indicate the line(s) that need to be reversed
- A detailed explanation for why the billing needs to be reversed

## Creating/Editing a Template

The IV module of FiTS offers the ability to save a current billing as a template for future billings. This option will allow departments that have similar billings each month to edit a prior billing as necessary in order to avoid creating a new billing each month from scratch.

In order to save a current IV as a template for future use, add all of the lines you would like included in the template. When this is complete, enter a Template Title into the text box next to the “**Save As Template**” button.

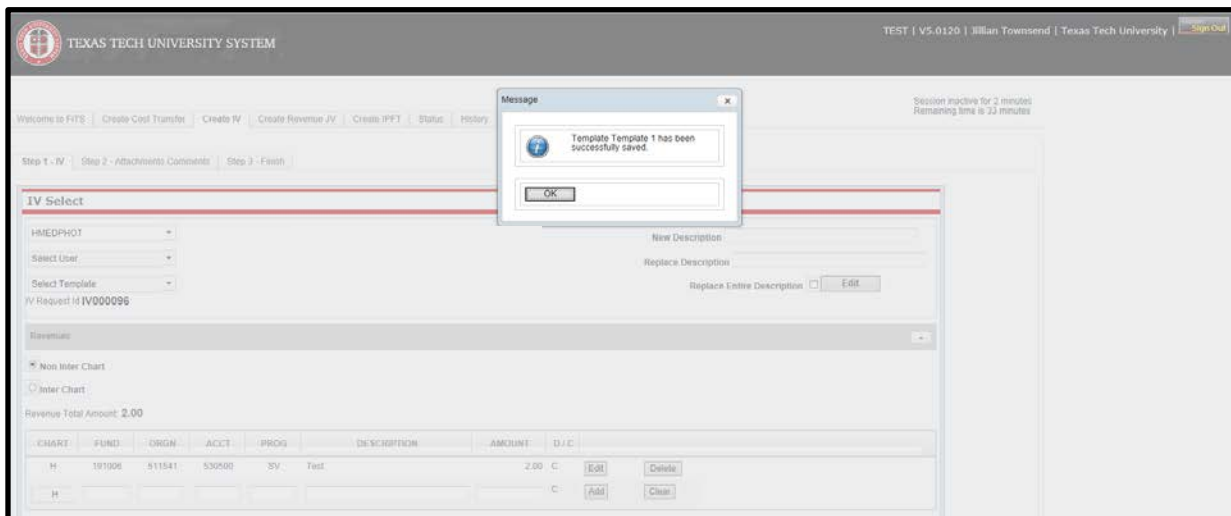
Then click the **“Save As Template”** button to save the template. Saved templates can be used by anyone with access to the System ID.



Click **“Save As Template”** button

Add a Template Title

After clicking the **“Save As Template”** button, a popup message will notify you that your template has been successfully saved.



To find a saved template to start a new billing, click on the drop down box below the **“Select System ID”** box at the top of the **“Step 1 – IV”** tab. Then select the user whose template you want to use from the **“Select User”** drop down box.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

Session inactive for 0 minutes  
Remaining time is 35 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**IV Select**

HMEDPHOT

Select User

Select User

AZT989 - Jillian Townsend

New Description

Replace Description

Replace Entire Description  Edit

Revenue

Non Inter Chart

Inter Chart

Revenue Total Amount: 0.00

CHART FUND

Select

Expenses

Expense Total Amount: 0.00

CHART FUND ORGN ACCT PROG DESCRIPTION AMOUNT D / C

Save As Template

Delete Template

Next select the template you would like to use from the **“Select Template”** drop down box.

TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

Session inactive for 2 minutes  
Remaining time is 33 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

**IV Select**

HMEDPHOT

AZT989 - Jillian Townsend

Select Template

Select Template

Jillian's Template

Template 1

New Description

Replace Description

Replace Entire Description  Edit

Revenue

Non Inter Chart

Inter Chart

Revenue Total Amount: 0.00

CHART FUND

Select

Expenses

Expense Total Amount: 0.00

CHART FUND ORGN ACCT PROG DESCRIPTION AMOUNT D / C

Save As Template

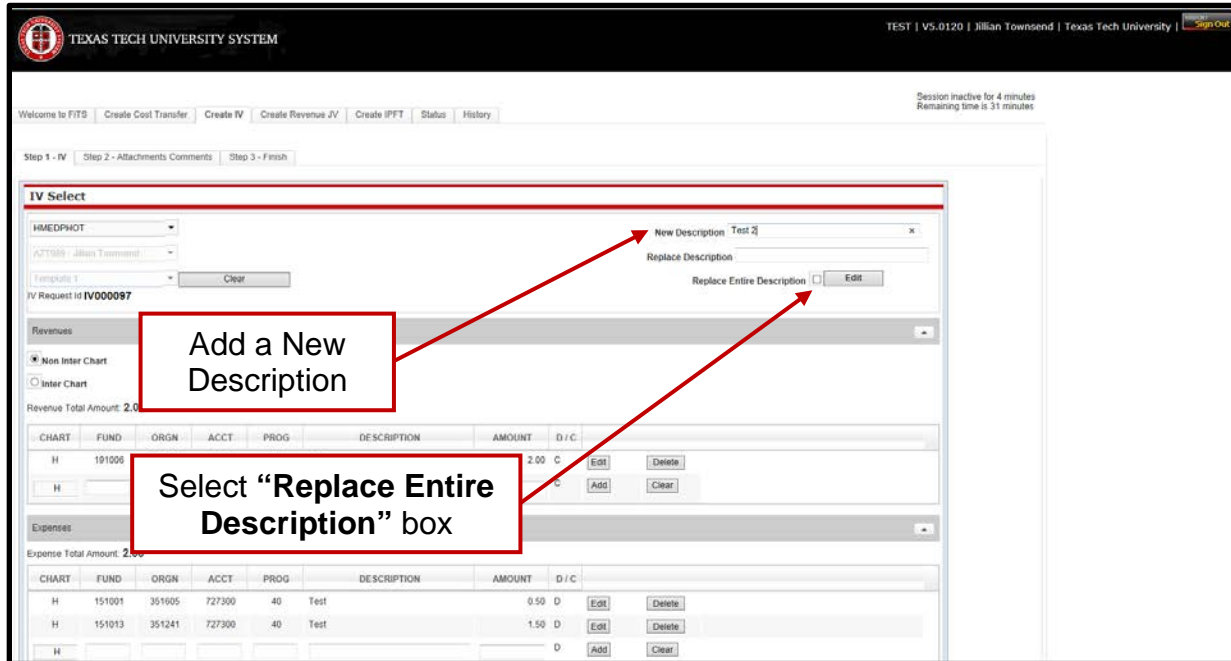
Delete Template

Once a template has been selected, the IV will populate with the lines that were included when the template was saved and a new FITS ID number will be assigned.

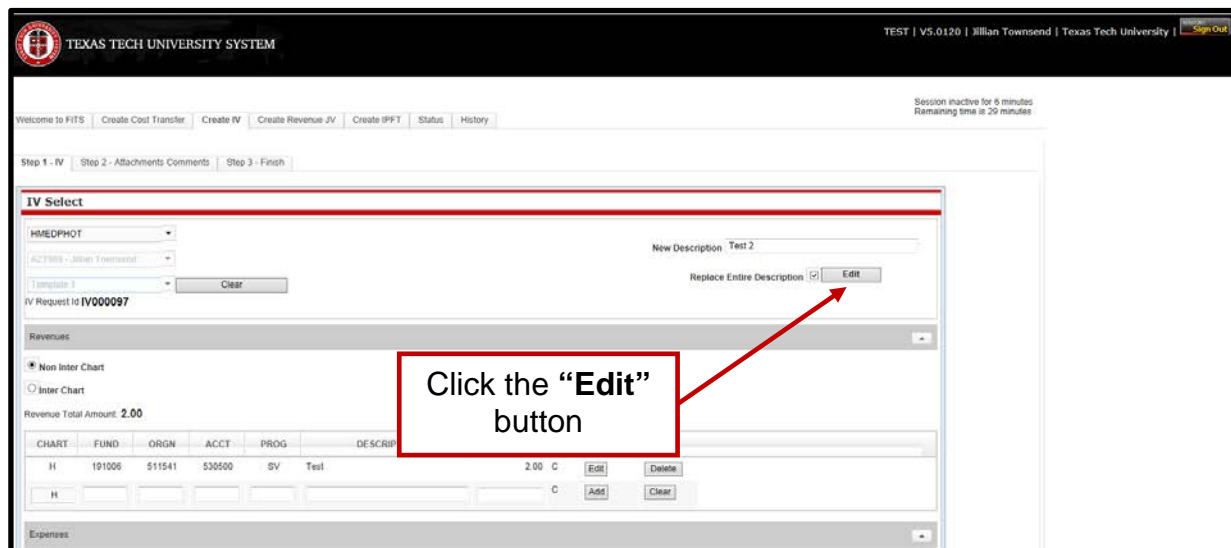
To edit the descriptions of the existing lines of the template selected, you can utilize the edit description feature at the top right corner of the IV. This feature allows users to replace all or

part of the description line with a new description. You can also edit a line’s description by clicking the **“Edit”** button to the right of a specific line.

In order to replace all of the line descriptions at once, you will need to enter the new description into the **“New Description”** text box and click the **“Replace Entire Description”** box.

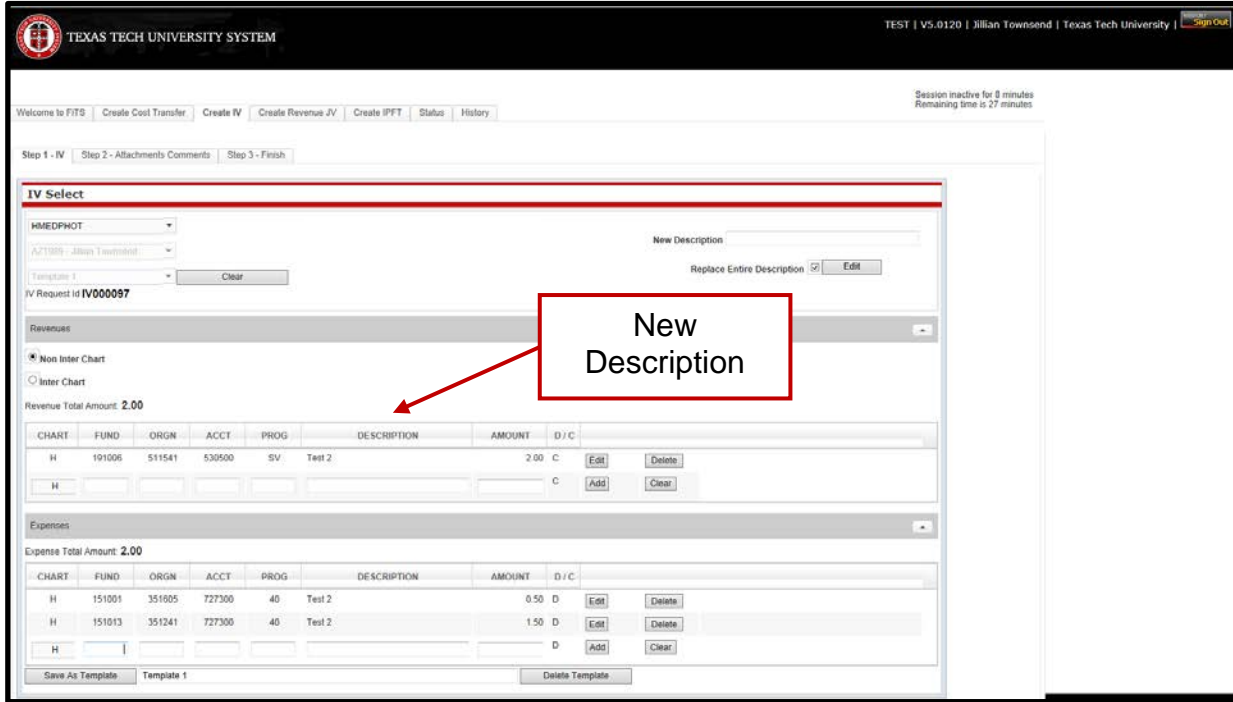


Click the **“Edit”** button for the description changes to go into effect.

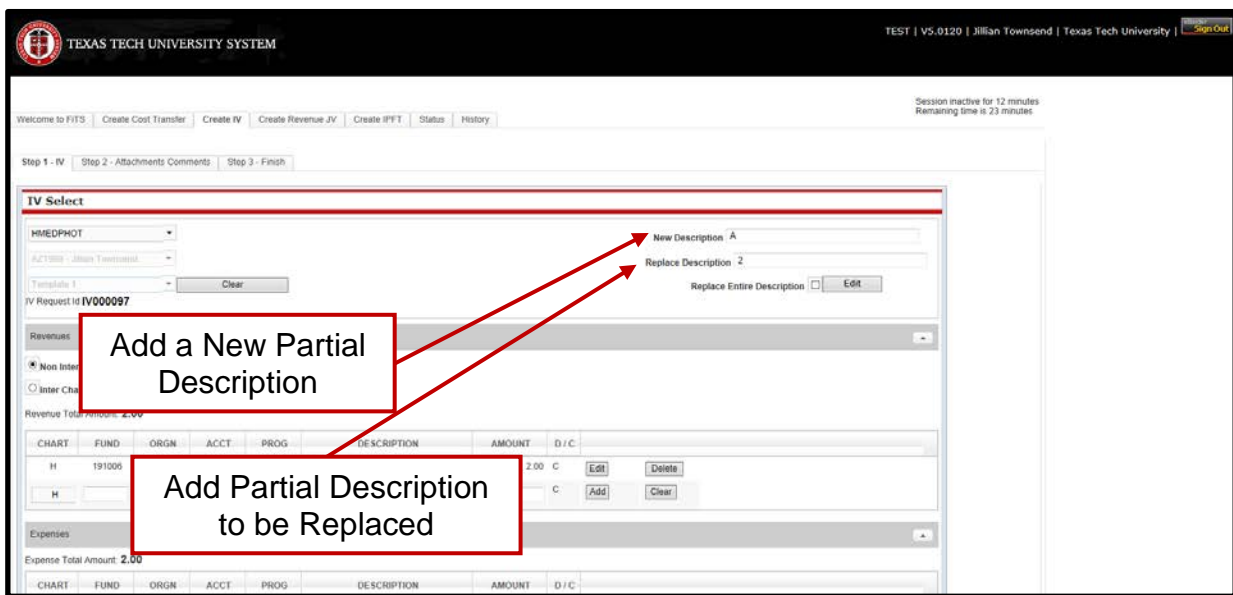




After clicking the **“Edit”** button the new description will be reflected in the Description column of the IV.



In order to replace a portion of an existing description, you will need to enter the portion of the new description you would like to add into the **“New Description”** text box, and also enter the portion of the old description you want replaced into the **“Replace Description”** text box.



Click the **“Edit”** button for the description changes to go into effect.

IV Select

HEMDPHOT: [Dropdown]

A77000 - Urban Treatment [Dropdown]

IV Request id IV000097

Revenues

Revenue Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	191006	511541	530500	SV	Test 2		

Expenses

Expense Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	151001	351605	727300	40	Test 2	0.50	D
H	151013	351241	727300	40	Test 2	1.50	D

After clicking the **“Edit”** button the new description will be reflected in the Description column of the IV.

IV Select

New Description: [Text Field]

Replace Description: [Text Field]

IV Request id IV000097

Revenues

Revenue Total Amount: 2.00

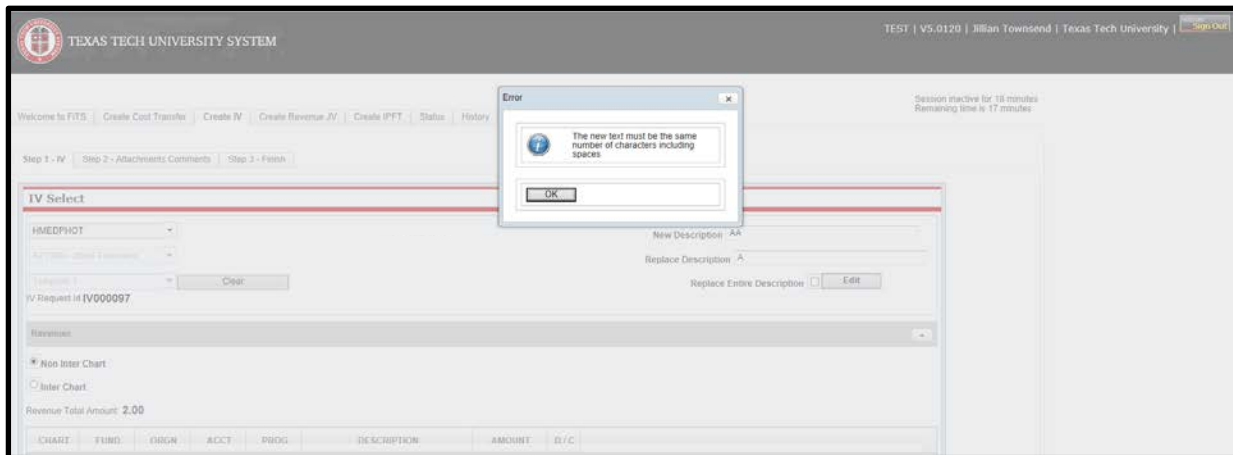
CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	191006	511541	530500	SV	Test A	2.00	C

Expenses

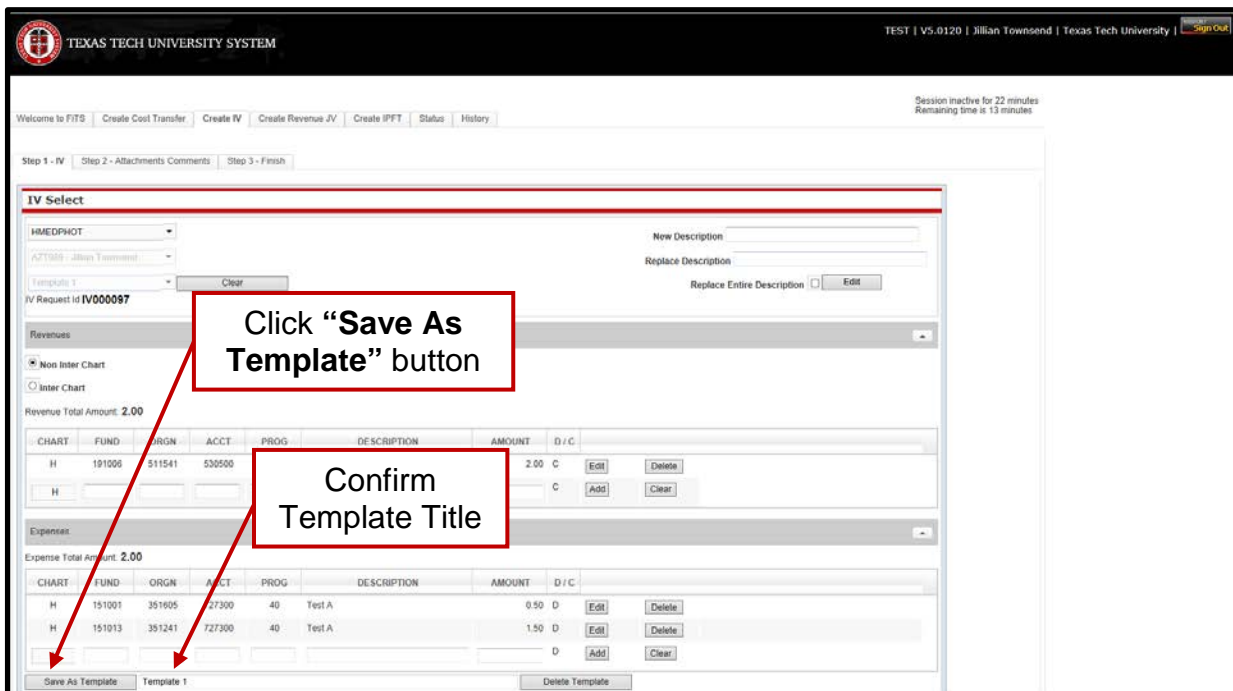
Expense Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
H	151001	351605	727300	40	Test A	0.50	D
H	151013	351241	727300	40	Test A	1.50	D

When replacing a portion of a description, the feature only allows the user to replace the part of the description with an equal number of characters. For example, replacing the letter “A” in the above screen shot with “AA” is not allowable. You will only be permitted to replace “A” with a single character. If your replacement description is unallowable, FiTS will show the following popup error after you click the **“Edit”** button.

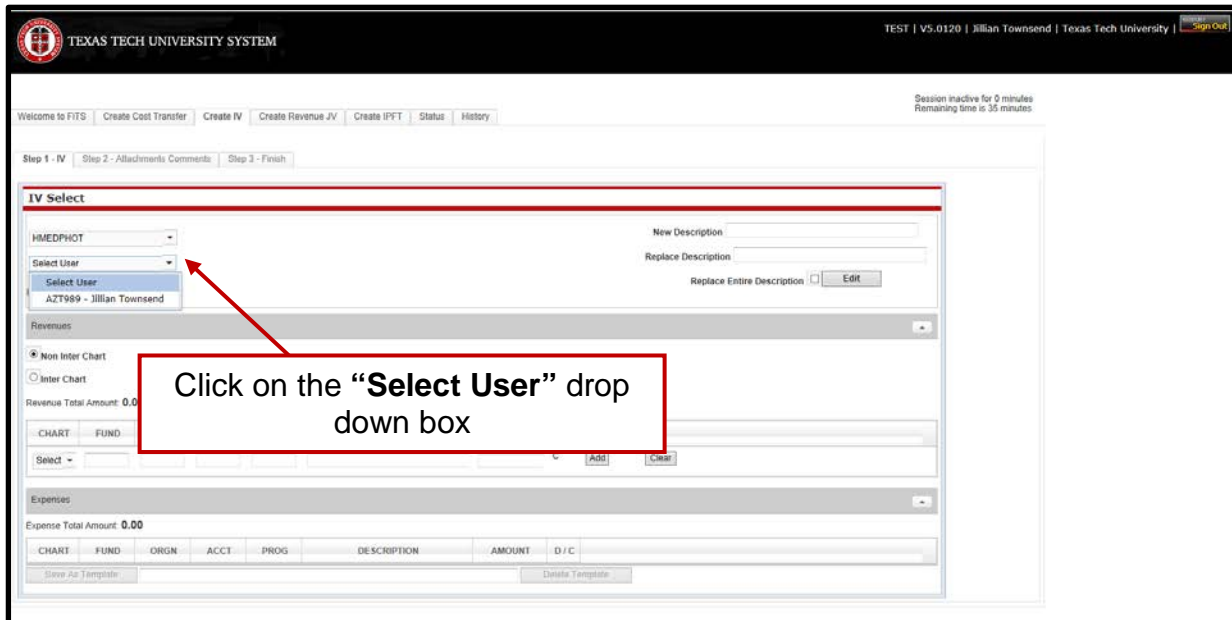


After editing your existing template, if you would like to save the most recent changes, review the template name at the bottom of the screen and confirm that the template name to be saved is populated in the text box next to the **“Save Template”** button. Then click the **“Save As Template”** button.



## Deleting a Template

To delete a saved template, you will click on the drop down box below the “Select System ID” box at the top of the “**Step 1 – IV**” tab. Then select your User ID from the “**Select User**” drop down box.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 35 minutes

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [dropdown]  
Select User: [dropdown] (AZT989 - Jillian Townsend)  
New Description: [text]  
Replace Description: [text]  
Replace Entire Description  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 0.00

CHART: [dropdown] FUND: [dropdown]  
Select: [dropdown] Add Clear

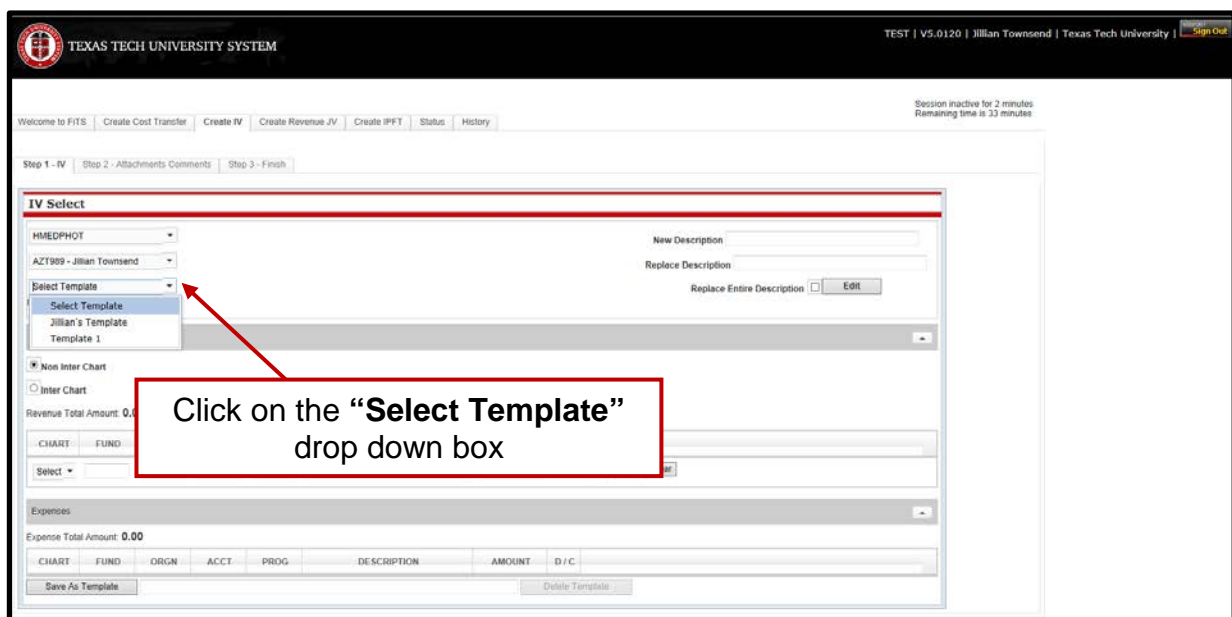
Expenses

Expense Total Amount: 0.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
-------	------	------	------	------	-------------	--------	-------

Save As Template Delete Template

Next select the template you would like to delete from the “**Select Template**” drop down box.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 2 minutes  
Remaining time is 32 minutes

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [dropdown]  
AZT989 - Jillian Townsend  
Select Template: [dropdown] (Jillian's Template, Template 1)  
New Description: [text]  
Replace Description: [text]  
Replace Entire Description  Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 0.00

CHART: [dropdown] FUND: [dropdown]  
Select: [dropdown] Add Clear

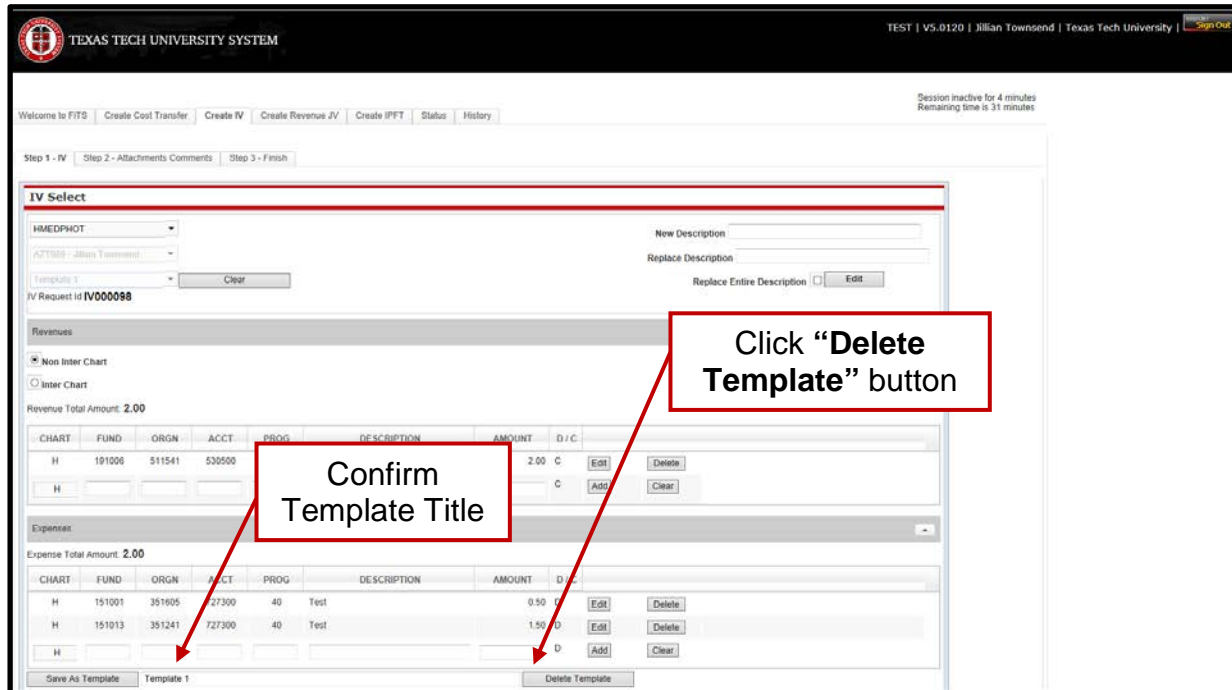
Expenses

Expense Total Amount: 0.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C
-------	------	------	------	------	-------------	--------	-------

Save As Template Delete Template

After selecting the template to be deleted, review the template name at the bottom of the screen and confirm that the template name to be deleted is populated in the text box next to the “Save As Template” button. Then click the **“Delete Template”** button.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [Dropdown]  
 ACTION: [Dropdown]  
 Template 1: [Dropdown] Clear  
 IV Request Id: IV000098

New Description: [Text Box]  
 Replace Description: [Text Box] Replace Entire Description [ ] Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191000	511541	530500			2.00	C	Edit Delete
H							C	Add Clear

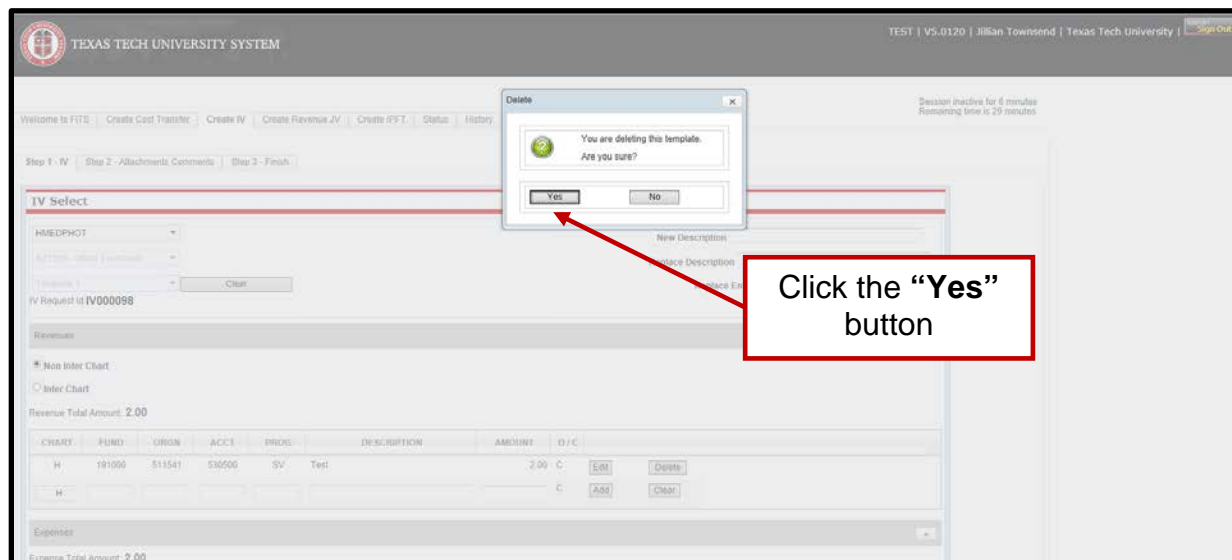
Expenses

Expense Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	151001	351605	27300	40	Test	0.50	D	Edit Delete
H	151013	351241	727300	40	Test	1.50	D	Edit Delete
H							D	Add Clear

Save As Template: Template 1 Delete Template

After clicking the **“Delete Template”** button, a popup message will appear to confirm, that you are sure you want to delete the template. If you are sure of your selection, click **“Yes”**. If not, click **“No”**.



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

**IV Select**

HMEDPHOT: [Dropdown]  
 ACTION: [Dropdown]  
 Template 1: [Dropdown] Clear  
 IV Request Id: IV000098

New Description: [Text Box]  
 Replace Description: [Text Box] Replace Entire Description [ ] Edit

Revenues

Non Inter Chart  
 Inter Chart

Revenue Total Amount: 2.00

CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	
H	191000	511541	530500	SV	Test	2.00	C	Edit Delete
H							C	Add Clear

Expenses

Expense Total Amount: 2.00

Delete

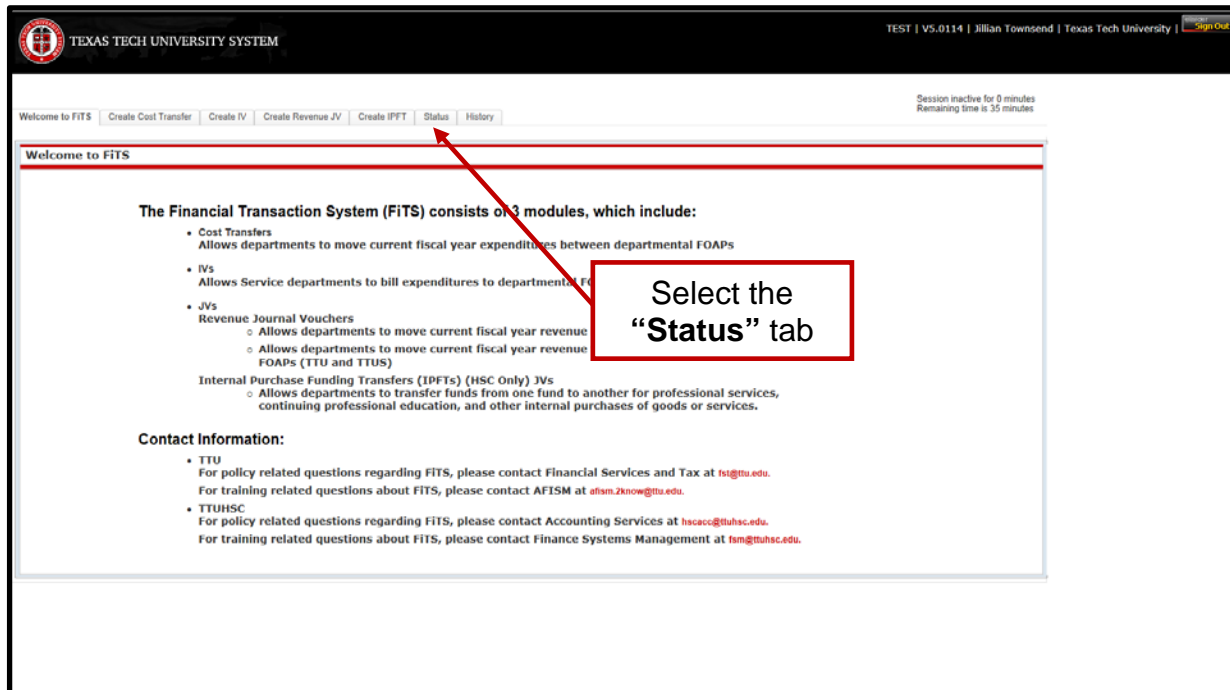
You are deleting this template.  
Are you sure?

Yes No

## Deleting an IV

Only the Originator of an IV has the ability to delete an IV from FiTS.

In order to delete an IV, access FiTS and select the “**Status**” tab.

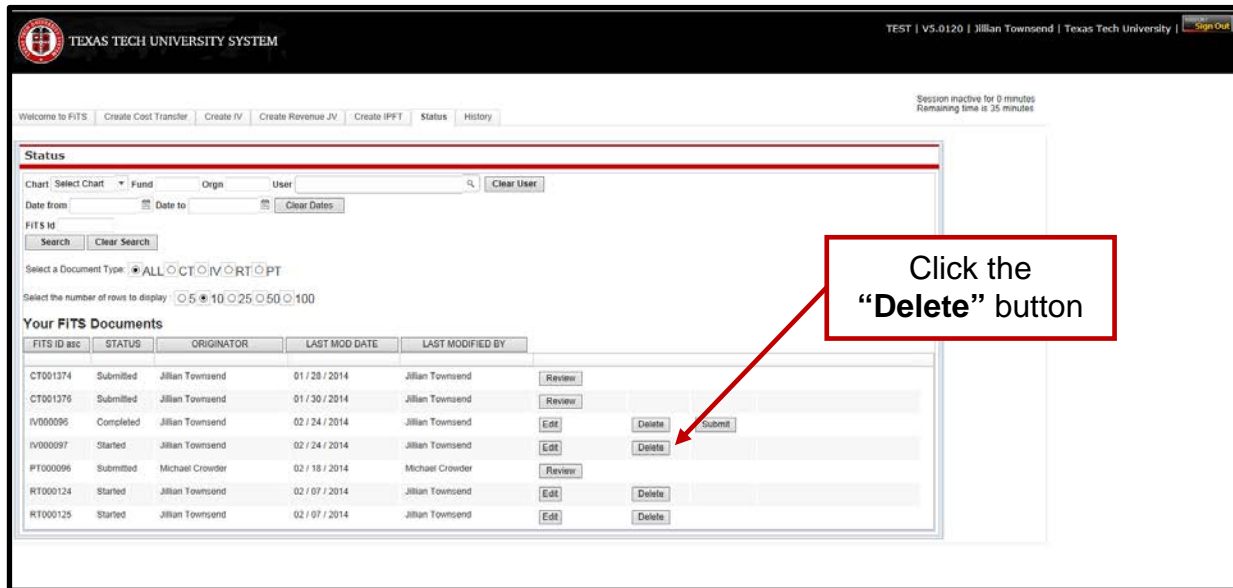


After selecting the “**Status**” tab, the screen will populate with all of the IVs that you originated that have not been submitted or processed.

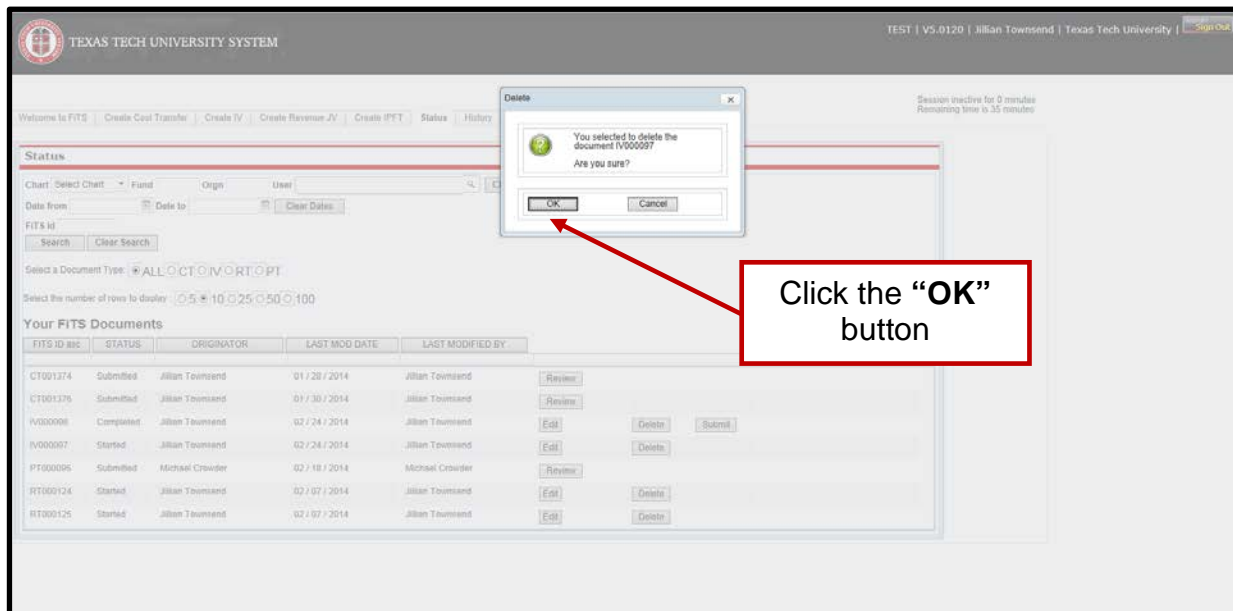
Search for the IV(s) you wish to delete by Fund, Orgn, a date range that the IV was last modified, and/or FiTS ID or by using the forward and back buttons at the bottom of the page.

\*For more detailed instructions on how to use the search capabilities on the “Status” page, see page 24 of this training document.

Once the IV to be deleted is located, click on the “**Delete**” button to the right of the IV.



After clicking the **“Delete”** button, a pop up message will appear to confirm, that you are sure you want to delete the IV. If you are sure of your selection, click **“OK”**. If not, click **“Cancel”**.

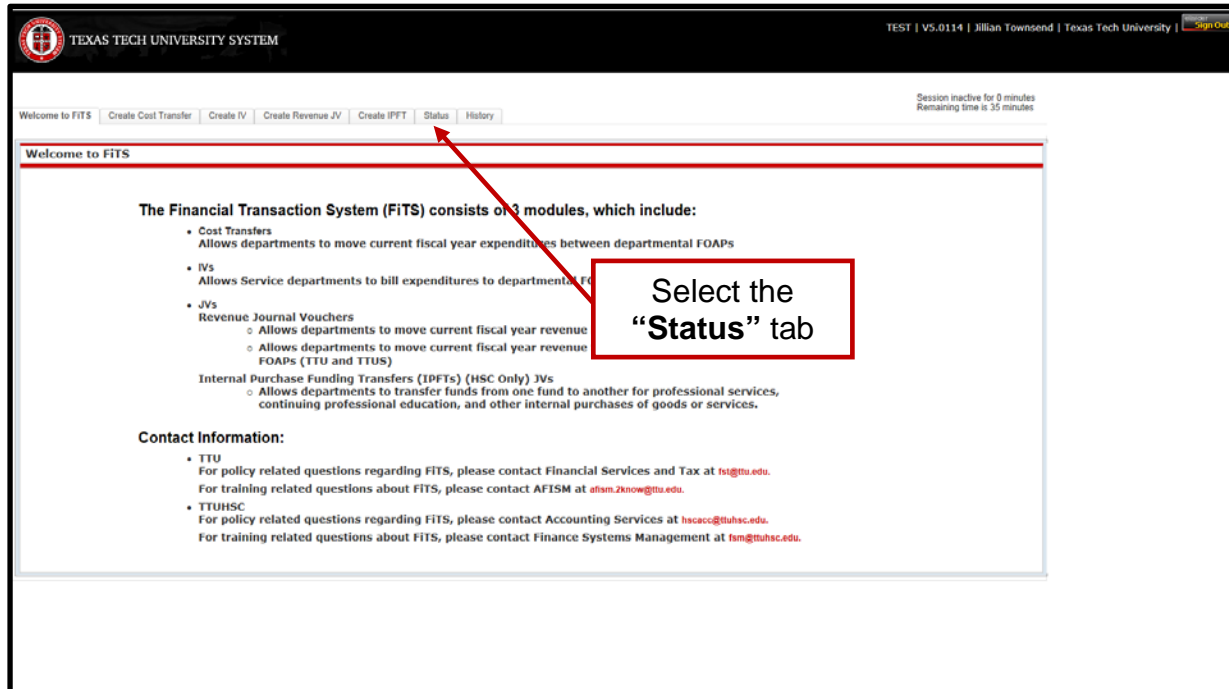


IVs that remain in the **“Status”** tab and have not been modified for 7 days will result in an email to the Originator informing them that the IV will be deleted the following Monday. To prevent the IV from being deleted, the Originator will need to make the necessary corrections before the following Monday.

## Searching the Status Tab

The “**Status**” tab can be used to search for any IV(s) that have not been completed or processed.

To begin, click on the “**Status**” tab from the home page.



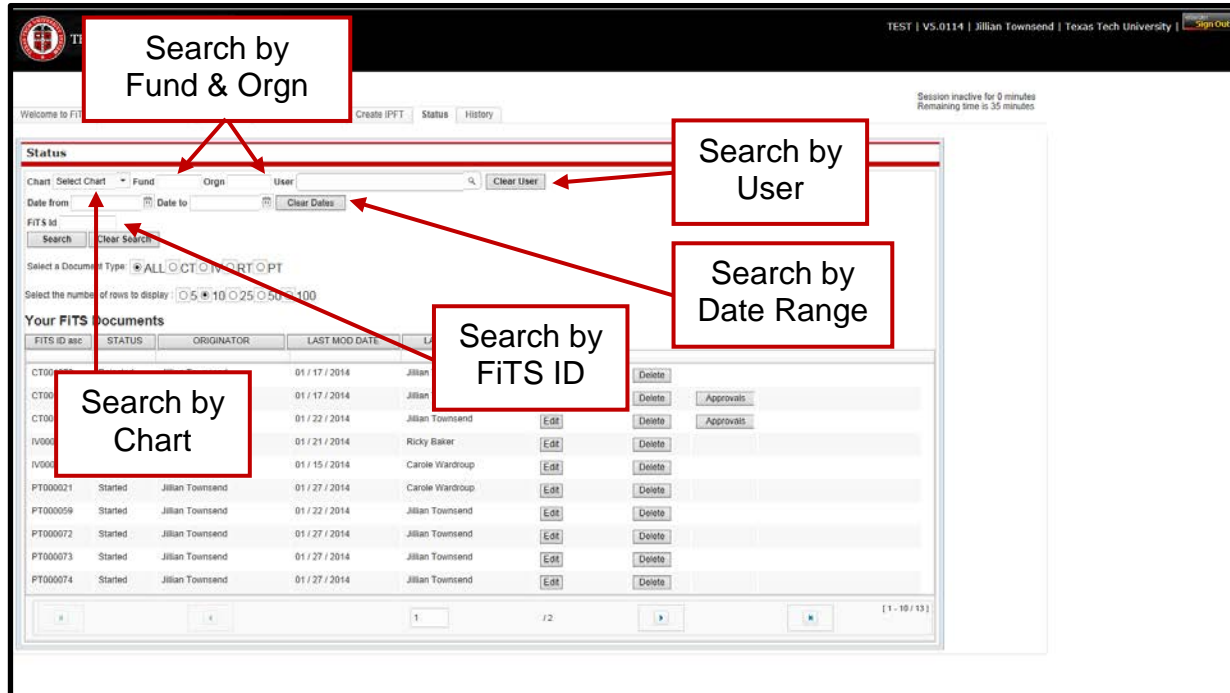
The “**Status**” tab automatically populates with all IVs for which you are the Originator.

Users can search for a specific IV the following ways:

- By Chart: Use “H” for Health Sciences Center
- By Fund & Orgn: Search by either Fund or Orgn, or both
- By User: Returns results for all IVs the user is involved in
- By Date Range: Returns results by the date last modified
- By FITS ID: Enter all or a portion of the ID

Users can search using multiple parameters from the list above. Depending on how many parameters are used, the search may have to be refined or expanded.



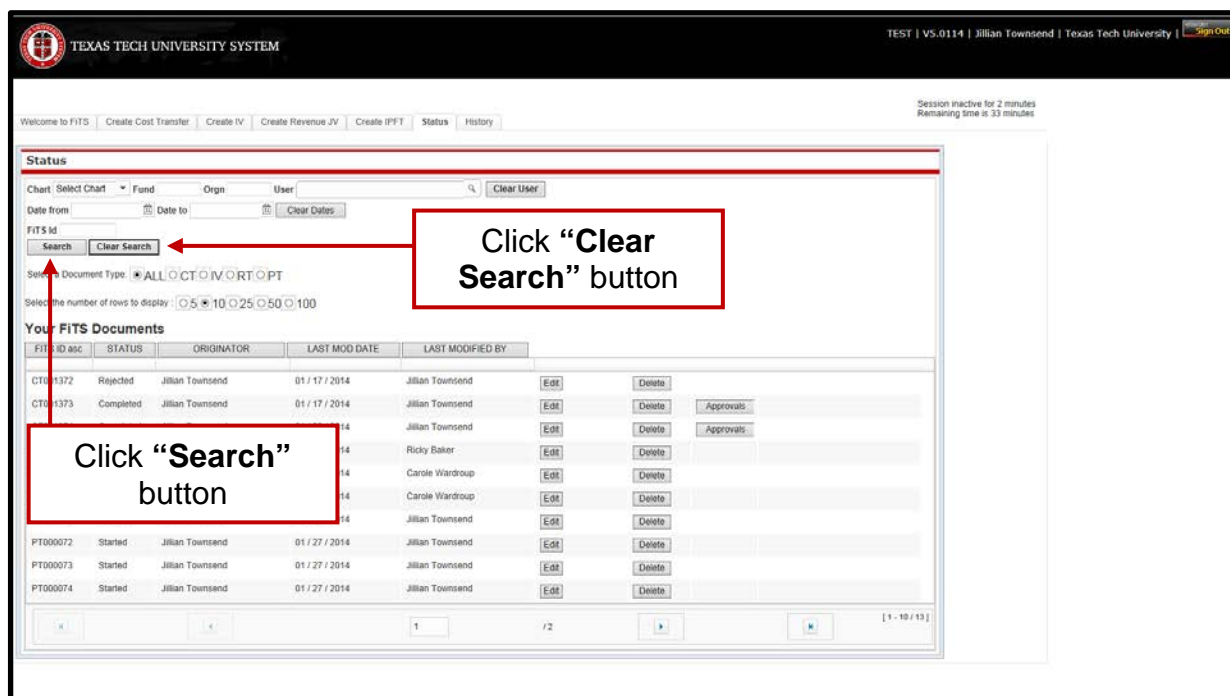


Search by Fund & Orgn  
 Search by User  
 Search by Date Range  
 Search by FiTS ID  
 Search by Chart

Status  
 Chart: Select Chart Fund Orgn User Clear User  
 Date from Date to Clear Dates  
 FiTS Id Search Clear Search  
 Select a Document Type: ALL OCT OIV ORT OPT  
 Select the number of rows to display: 5 10 25 50 100  
 Your FiTS Documents  

FiTS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY	Actions
CT000001		Jillian	01 / 17 / 2014	Jillian	Delete Approvals
CT000002		Jillian	01 / 17 / 2014	Jillian	Delete Approvals
CT000003		Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Delete Approvals
IV000001		Ricky Baker	01 / 21 / 2014	Ricky Baker	Delete
IV000002		Carole Wardroup	01 / 15 / 2014	Carole Wardroup	Delete
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit Delete
PT000059	Started	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit Delete
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit Delete
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit Delete

After entering the desired search parameters, click the **“Search”** button to perform the search. If you would like to perform a different search, you can click the **“Clear Search”** button to clear the search fields.

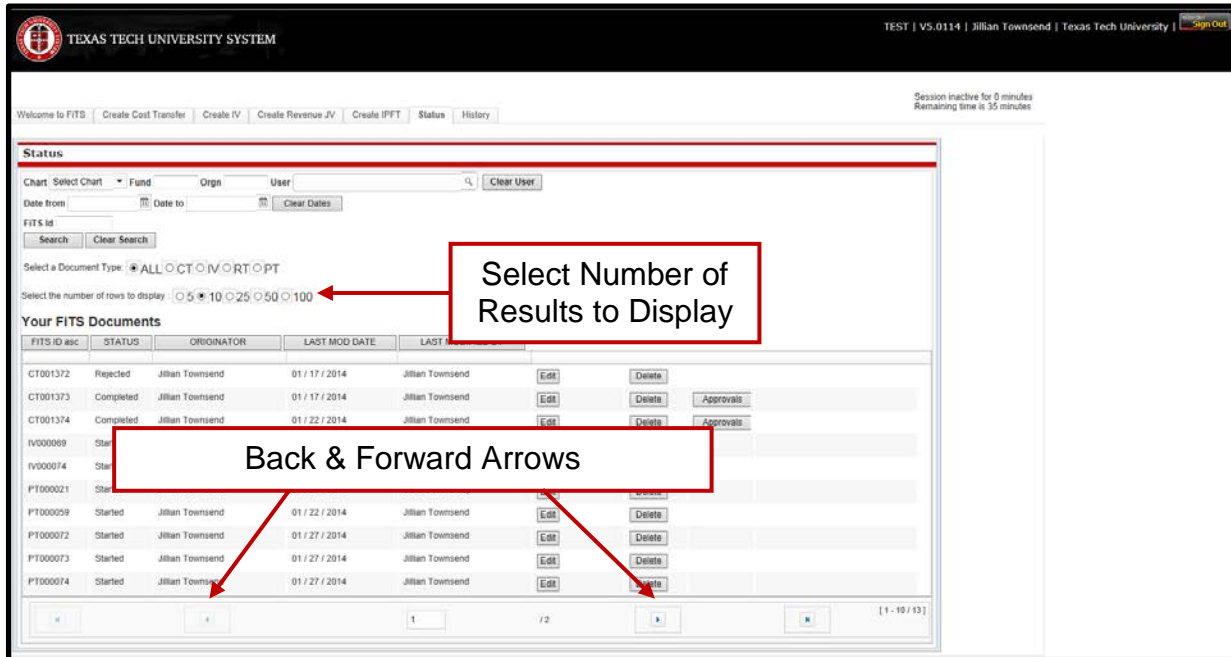


Click **“Clear Search”** button  
 Click **“Search”** button

Status  
 Chart: Select Chart Fund Orgn User Clear User  
 Date from Date to Clear Dates  
 FiTS Id Search Clear Search  
 Select a Document Type: ALL OCT OIV ORT OPT  
 Select the number of rows to display: 5 10 25 50 100  
 Your FiTS Documents  

FiTS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY	Actions
CT0001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit Delete
CT0001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit Delete Approvals
		Jillian Townsend		Jillian Townsend	Edit Delete Approvals
		Ricky Baker		Ricky Baker	Edit Delete
		Carole Wardroup		Carole Wardroup	Edit Delete
		Carole Wardroup		Carole Wardroup	Edit Delete
		Jillian Townsend		Jillian Townsend	Edit Delete
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit Delete
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit Delete

Depending on how many results are returned, you can move between the pages of results using the arrow buttons near the bottom of the page. You may select the number of rows displayed per page by using the radio buttons.



TEST | V5.0114 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 35 minutes

**Status**

Chart: Select Chart Fund Orgn User

Date from:  Date to:

FITS Id

Select a Document Type:  ALL  CT  IV  RT  PT

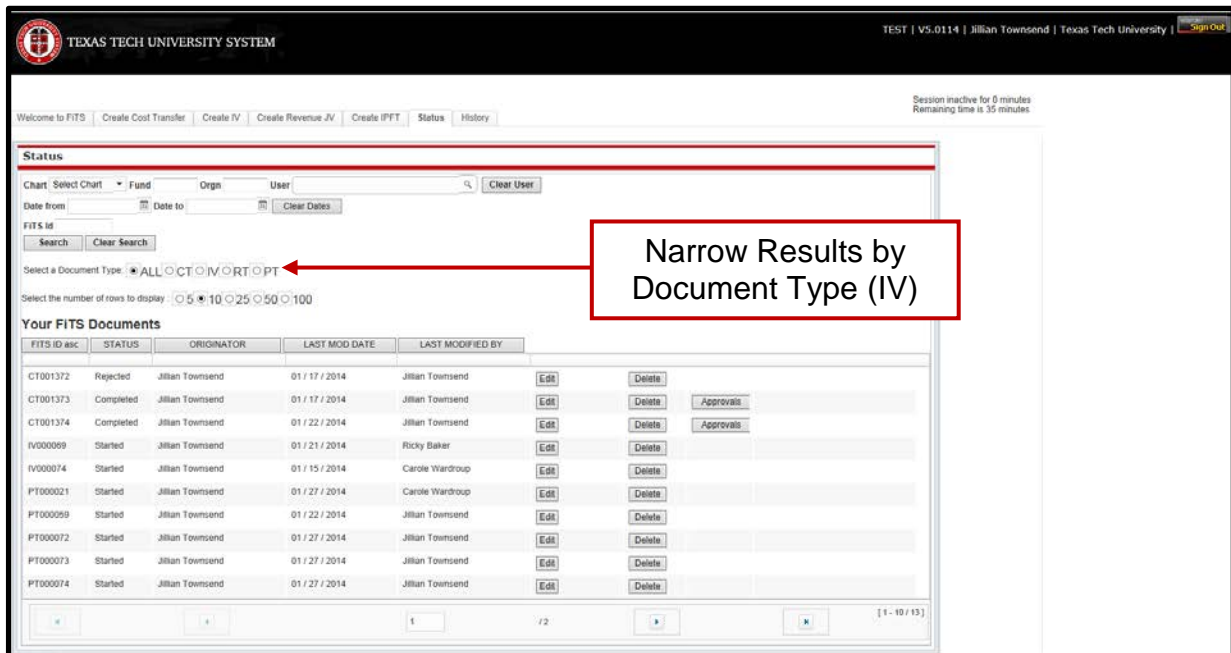
Select the number of rows to display:  5  10  25  50  100

**Your FITS Documents**

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/> <input type="button" value="Approvals"/>
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/> <input type="button" value="Approvals"/>
IV000069	Star				<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
IV000074	Star				<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000021	Star				<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000059	Started	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

[ 1 - 10 / 13 ]

In addition to IVs, FITS is used for Cost Transfers (CT), Revenue JVs (RT), and Internal Purchase Funding Transfers (PT). You can limit search results to only Interdepartmental Billings (IV) by selecting the IV radio button.



TEST | V5.0114 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 35 minutes

**Status**

Chart: Select Chart Fund Orgn User

Date from:  Date to:

FITS Id

Select a Document Type:  ALL  CT  IV  RT  PT

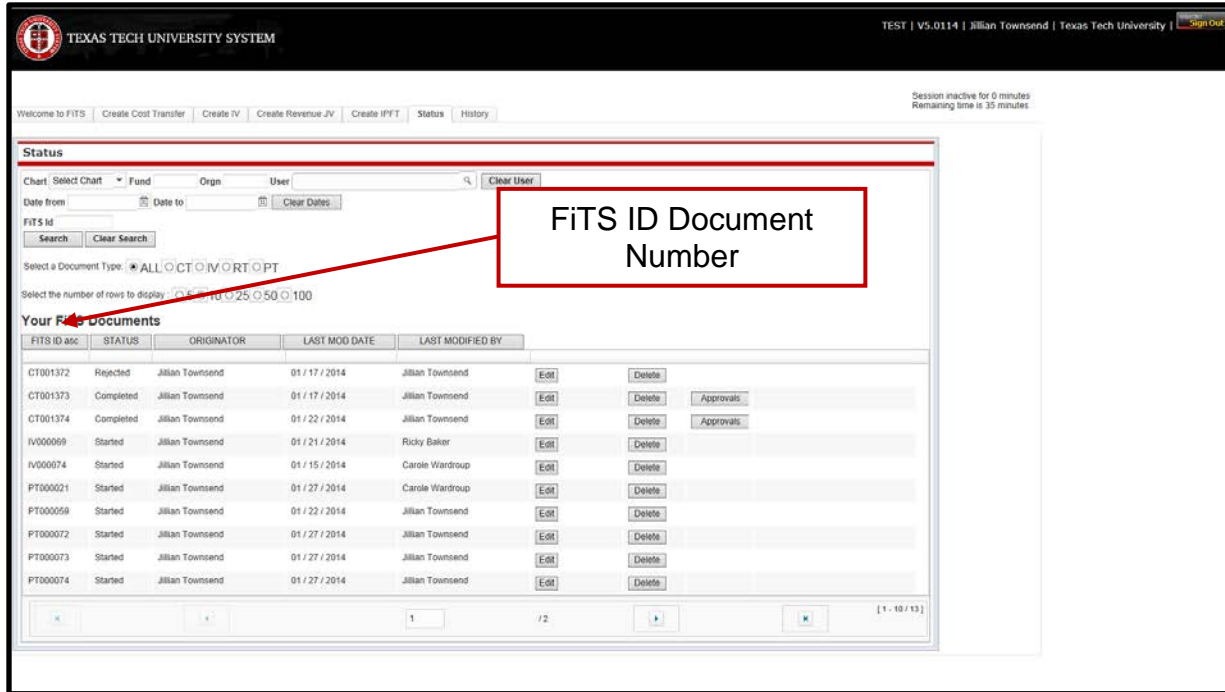
Select the number of rows to display:  5  10  25  50  100

**Your FITS Documents**

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/> <input type="button" value="Approvals"/>
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/> <input type="button" value="Approvals"/>
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000059	Started	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

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The results will be sorted numerically by the FiTS ID. However, the results can be sorted by any of the columnar fields.



The search results will also show the following columns:

- The Status of the IV
- The Originator of the IV
- The Date of the last modification to the IV
- The User who last modified the IV

The “**Status**” column of the search results will reflect the current stage in the FiTS process for a specific IV. These stages include:

- **Started:** IV has been started by the Originator, but not marked complete. If you are the Originator for an IV, you will have the option to click the “**Edit**” button to make changes, or the “**Delete**” button to delete the IV from FiTS.
- **Completed:** IV has been marked complete, but not submitted for processing. If you are an Originator for an IV, you will have the option to click the “**Edit**”, “**Delete**”, or “**Submit**” buttons. Selecting the “**Submit**” button will send the IV for processing.
- **Errors:** IV has incurred an error while trying to post. Please contact Financial Systems Management at [FsmElp@ttuhsc.edu](mailto:FsmElp@ttuhsc.edu) for assistance.



TEST | V5.0114 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 35 minutes

**Status**

Chart: [Select Chart](#) | Fund: | Orgn: | User: | [Clear User](#)

Date from: | Date to: | [Clear Dates](#)

FITS Id: | [Search](#) | [Clear Search](#)

Select a Document Type:  ALLOCT  INV  OPT

Select the number of rows to display:  5  10  25  50  100

**Your FITS Documents**

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>   <a href="#">Approvals</a>
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	<a href="#">Review</a>	
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	<a href="#">Edit</a>	<a href="#">Delete</a>
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	<a href="#">Edit</a>	<a href="#">Delete</a>
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	<a href="#">Edit</a>	<a href="#">Delete</a>
PT000059	Started	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
RT000023	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
RT000024	Started	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>

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The other 3 columns show the user who originated the IV, the date of the last modification of the IV, and the user who made the last modification.

TEST | V5.0114 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 0 minutes  
Remaining time is 35 minutes

**Status**

Chart: [Select Chart](#) | Fund: | Orgn: | User: | [Clear User](#)

Date from: | Date to: | [Clear Dates](#)

FITS Id: | [Search](#) | [Clear Search](#)

Select a Document Type:  ALLOCT  INV  OPT

Select the number of rows to display:  5  10  25  50  100

**Your FITS Documents**

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>   <a href="#">Approvals</a>
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	<a href="#">Review</a>	
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	<a href="#">Edit</a>	<a href="#">Delete</a>
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	<a href="#">Edit</a>	<a href="#">Delete</a>
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	<a href="#">Edit</a>	<a href="#">Delete</a>
PT000059	Started	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
RT000023	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>
RT000024	Started	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	<a href="#">Edit</a>	<a href="#">Delete</a>

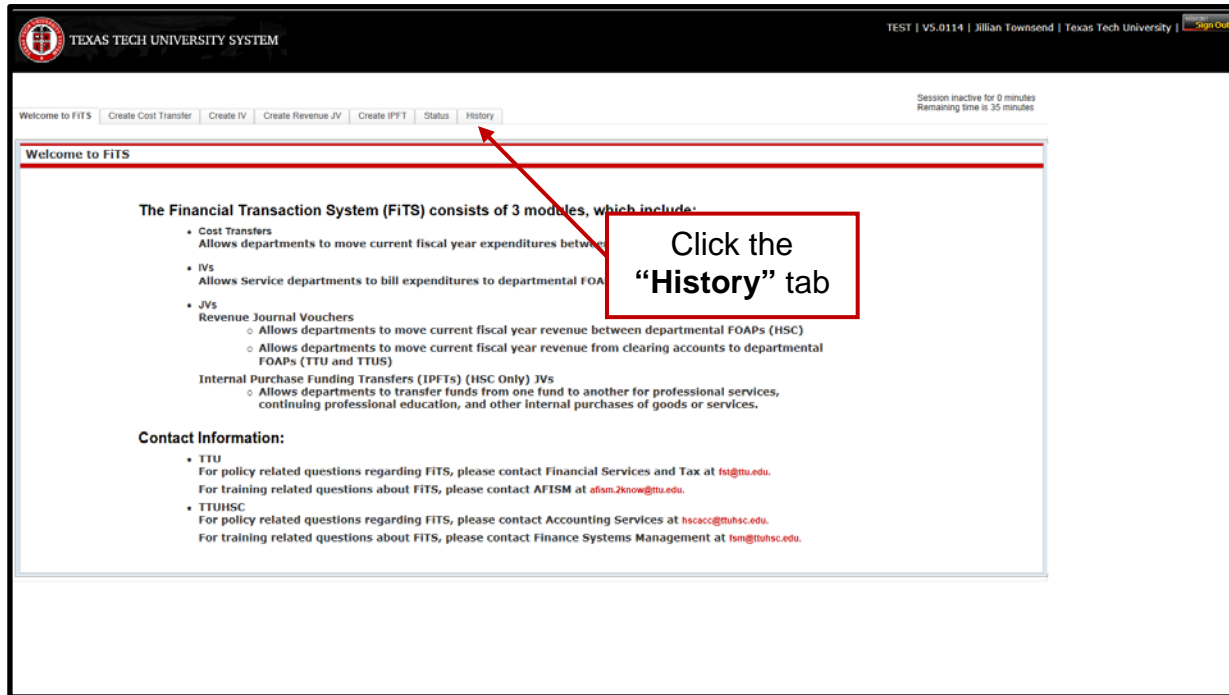
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## Searching the History Tab

The “**History**” tab can be used to search for any IV(s) that has been processed and posted.

To begin, click on the “**History**” tab from the home page of FiTS.

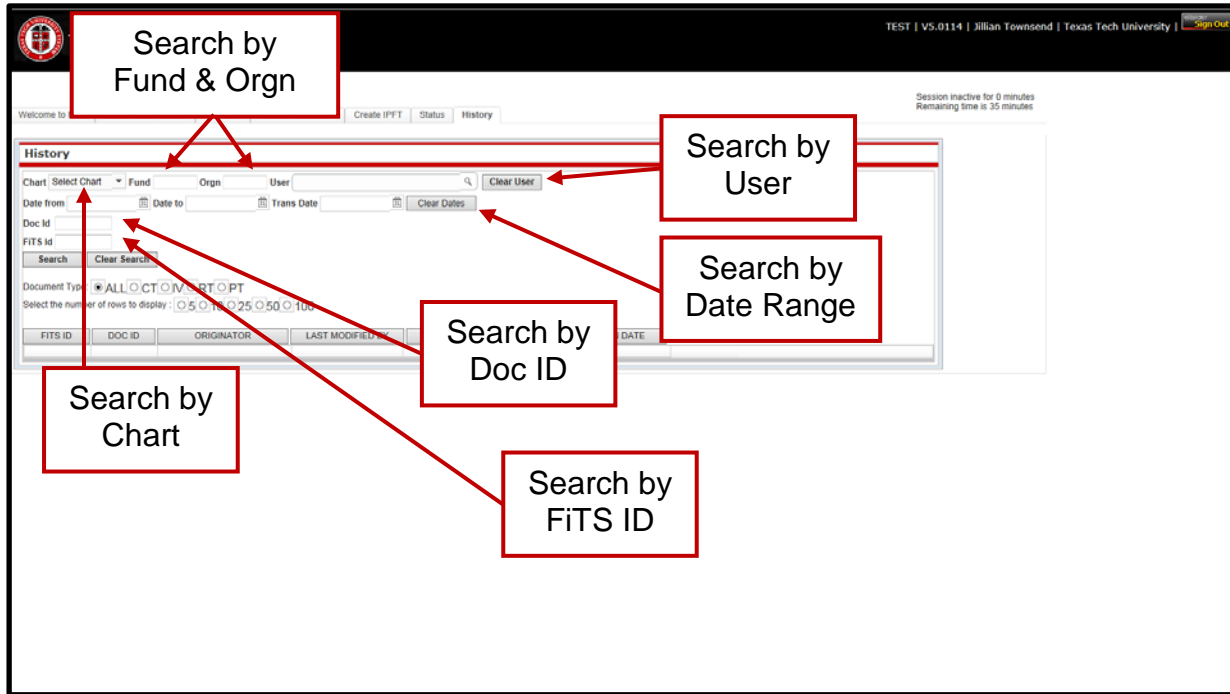


The “**History**” tab does not automatically populate with any IVs.

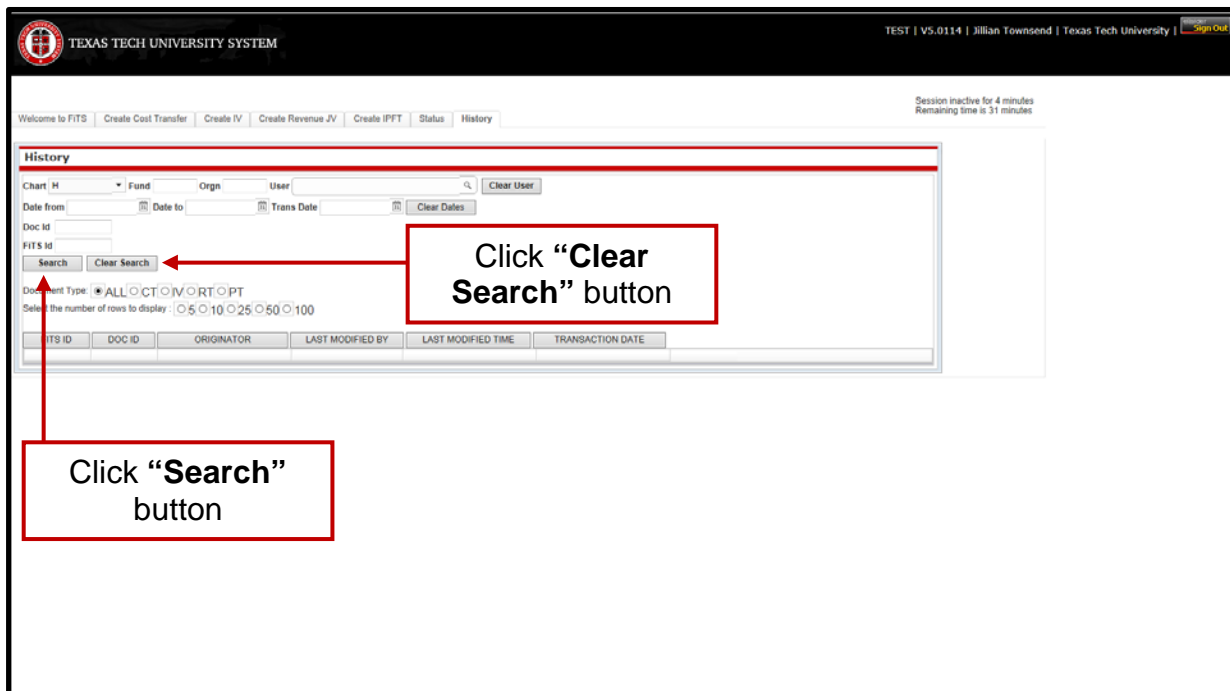
User can search for a specific IV the following ways:

- By Chart: Use “H” for Health Sciences Center
- By Fund & Orgn: Search by either Fund or Orgn, or both
- By User: Returns results for all IVs a user is involved in
- By Date Range: Returns results by date last modified
- By Transaction Date: Returns results for IVs posted by date entered
- By Doc ID: Enter all or a portion of the Banner Document ID that the IV was assigned when it was fully processed and posted.
- By FiTS ID: Enter all or a portion of the ID

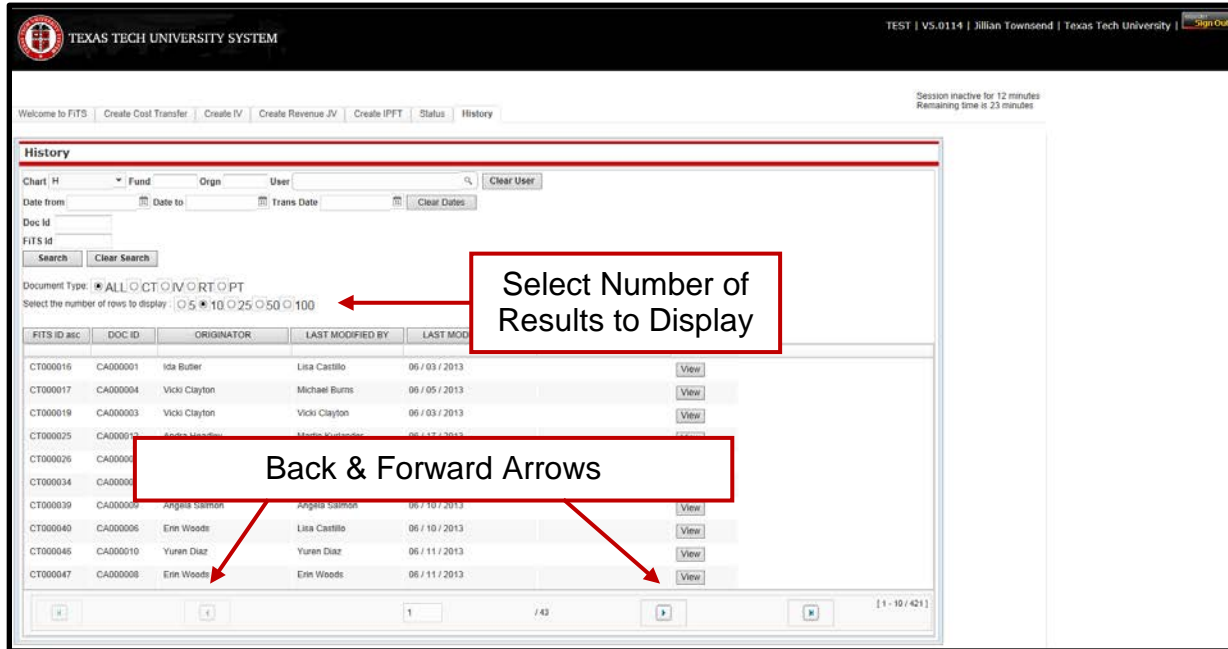
Users can search using multiple parameters from the list above. Depending on how many parameters are used, your search may have to be refined or expanded.



After entering in the desired search parameters, click the **“Search”** button to perform the search. To perform a different search, click the **“Clear Search”** button to clear the search fields.



Depending on how many results are returned, you can move between the pages of results using the arrow buttons near the bottom of the page. You may select the number of rows displayed per page by using the radio buttons.



History

Chart: H Fund: \_\_\_\_\_ Orgn: \_\_\_\_\_ User: \_\_\_\_\_ Clear User

Date from: \_\_\_\_\_ Date to: \_\_\_\_\_ Trans Date: \_\_\_\_\_ Clear Dates

Doc Id: \_\_\_\_\_

FITS Id: \_\_\_\_\_ Search Clear Search

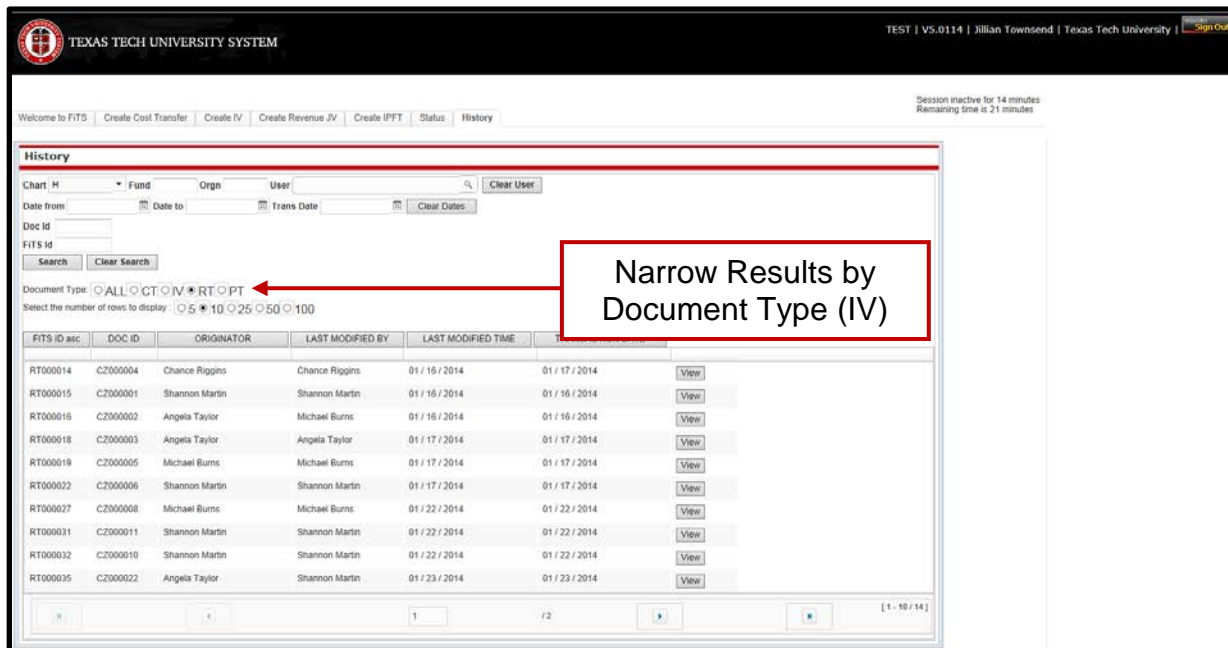
Document Type:  ALL  CT  IV  RT  PT

Select the number of rows to display:  5  10  25  50  100

FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MOD	
CT000016	CA000001	Ida Butler	Lisa Castillo	06 / 03 / 2013	<a href="#">View</a>
CT000017	CA000004	Vicki Clayton	Michael Burns	06 / 05 / 2013	<a href="#">View</a>
CT000019	CA000003	Vicki Clayton	Vicki Clayton	06 / 03 / 2013	<a href="#">View</a>
CT000025	CA000001	Angela Taylor	Michael Burns	06 / 11 / 2013	<a href="#">View</a>
CT000026	CA000001	Angela Taylor	Michael Burns	06 / 11 / 2013	<a href="#">View</a>
CT000034	CA000001	Angela Taylor	Michael Burns	06 / 11 / 2013	<a href="#">View</a>
CT000039	CA000009	Angela Simon	Angela Simon	06 / 10 / 2013	<a href="#">View</a>
CT000040	CA000006	Erin Woods	Lisa Castillo	06 / 10 / 2013	<a href="#">View</a>
CT000046	CA000010	Yuren Diaz	Yuren Diaz	06 / 11 / 2013	<a href="#">View</a>
CT000047	CA000008	Erin Woods	Erin Woods	06 / 11 / 2013	<a href="#">View</a>

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In addition to Interdepartmental Billings (IV), FITS is used for Cost Transfers (CT), Revenue JVs (RT), and Internal Purchase Funding Transfers (PT). You can limit search results to only IVs by selecting the IV radio button.



History

Chart: H Fund: \_\_\_\_\_ Orgn: \_\_\_\_\_ User: \_\_\_\_\_ Clear User

Date from: \_\_\_\_\_ Date to: \_\_\_\_\_ Trans Date: \_\_\_\_\_ Clear Dates

Doc Id: \_\_\_\_\_

FITS Id: \_\_\_\_\_ Search Clear Search

Document Type:  ALL  CT  IV  RT  PT

Select the number of rows to display:  5  10  25  50  100

FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME		
RT000014	C2000004	Chance Riggins	Chance Riggins	01 / 16 / 2014	01 / 17 / 2014	<a href="#">View</a>
RT000015	C2000001	Shannon Martin	Shannon Martin	01 / 16 / 2014	01 / 16 / 2014	<a href="#">View</a>
RT000016	C2000002	Angela Taylor	Michael Burns	01 / 16 / 2014	01 / 16 / 2014	<a href="#">View</a>
RT000018	C2000003	Angela Taylor	Angela Taylor	01 / 17 / 2014	01 / 17 / 2014	<a href="#">View</a>
RT000019	C2000005	Michael Burns	Michael Burns	01 / 17 / 2014	01 / 17 / 2014	<a href="#">View</a>
RT000022	C2000006	Shannon Martin	Shannon Martin	01 / 17 / 2014	01 / 17 / 2014	<a href="#">View</a>
RT000027	C2000008	Michael Burns	Michael Burns	01 / 22 / 2014	01 / 22 / 2014	<a href="#">View</a>
RT000031	C2000011	Shannon Martin	Shannon Martin	01 / 22 / 2014	01 / 22 / 2014	<a href="#">View</a>
RT000032	C2000010	Shannon Martin	Shannon Martin	01 / 22 / 2014	01 / 22 / 2014	<a href="#">View</a>
RT000035	C2000022	Angela Taylor	Shannon Martin	01 / 23 / 2014	01 / 23 / 2014	<a href="#">View</a>

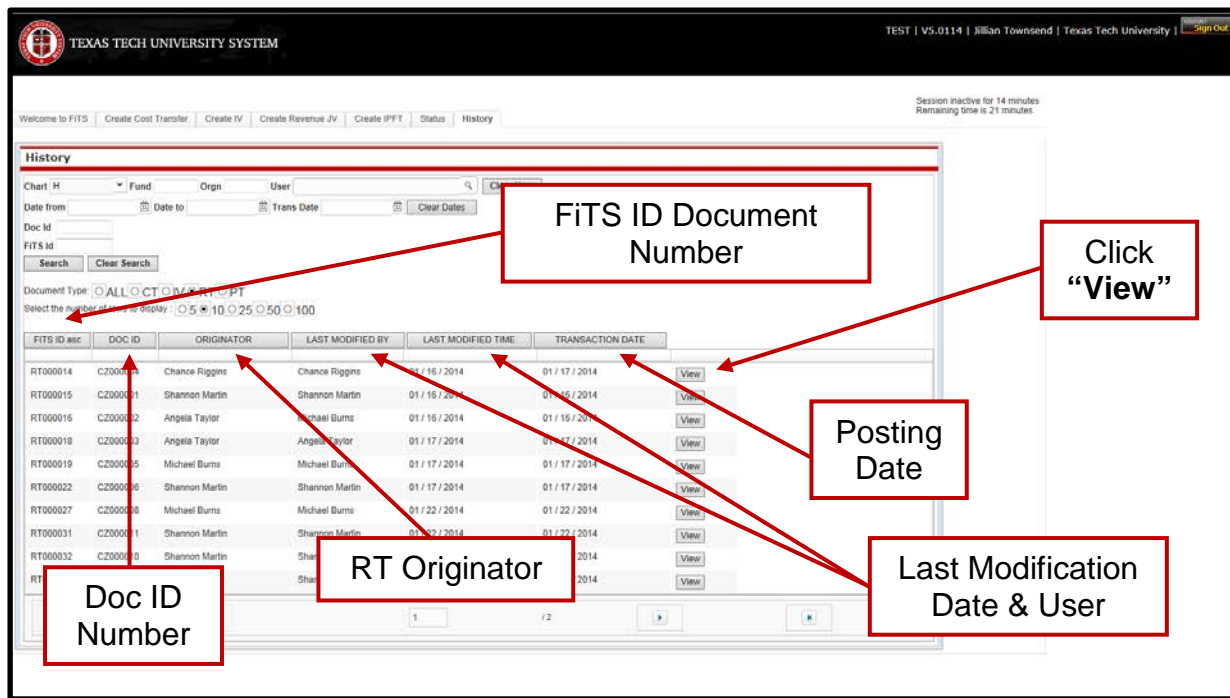
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The results will be sorted numerically by the FiTS ID. However, the results can be sorted by any of the columnar fields.

The search results will also show the following columns:

- The Banner Document ID assigned when processed
- The Originator of the IV
- The User who last modified the IV
- The Date of the last modification to the IV
- The Date the IV was processed and posted

To view the detail of the processed IV, click the **“View”** button.



The screenshot displays the 'History' section of the Texas Tech University System. It includes a search interface with fields for Chart, Fund, Origin, and User, and a table of IV records. The table columns are: FiTS ID asc, DOC ID, ORIGINATOR, LAST MODIFIED BY, LAST MODIFIED TIME, and TRANSACTION DATE. Each row has a 'View' button. Red annotations highlight key fields: 'FiTS ID Document Number' (pointing to FiTS ID and DOC ID), 'Click "View"' (pointing to a View button), 'Posting Date' (pointing to TRANSACTION DATE), 'Last Modification Date & User' (pointing to LAST MODIFIED TIME), 'RT Originator' (pointing to ORIGINATOR), and 'Doc ID Number' (pointing to DOC ID).

FiTS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME	TRANSACTION DATE	View
RT000014	C2000001	Chance Riggins	Chance Riggins	01/16/2014	01/17/2014	View
RT000015	C2000001	Shannon Martin	Shannon Martin	01/16/2014	01/16/2014	View
RT000016	C2000002	Angela Taylor	Michael Burns	01/16/2014	01/16/2014	View
RT000018	C2000002	Angela Taylor	Angela Taylor	01/17/2014	01/17/2014	View
RT000019	C2000005	Michael Burns	Michael Burns	01/17/2014	01/17/2014	View
RT000022	C2000006	Shannon Martin	Shannon Martin	01/17/2014	01/17/2014	View
RT000027	C2000008	Michael Burns	Michael Burns	01/22/2014	01/22/2014	View
RT000031	C2000011	Shannon Martin	Shannon Martin	01/22/2014	01/22/2014	View
RT000032	C2000010	Shannon Martin	Shannon Martin	01/22/2014	01/22/2014	View

If you have a policy question regarding the IV process, please contact Accounting Services at [AccountingElp@ttuhsc.edu](mailto:AccountingElp@ttuhsc.edu).

If you have a training question about FiTS, please contact Finance Systems Management at [FSMElp@ttuhsc.edu](mailto:FSMElp@ttuhsc.edu).