

Financial Transaction System (FiTS) – Internal Purchase Funding Transfers

The Internal Purchase Funding Transfer (IPFT) module of the Financial Transaction System (FiTS) allows departments to transfer funds from one fund to another for professional services, continuing professional education, and other internal purchases of goods or services that are not in the normal course of business.

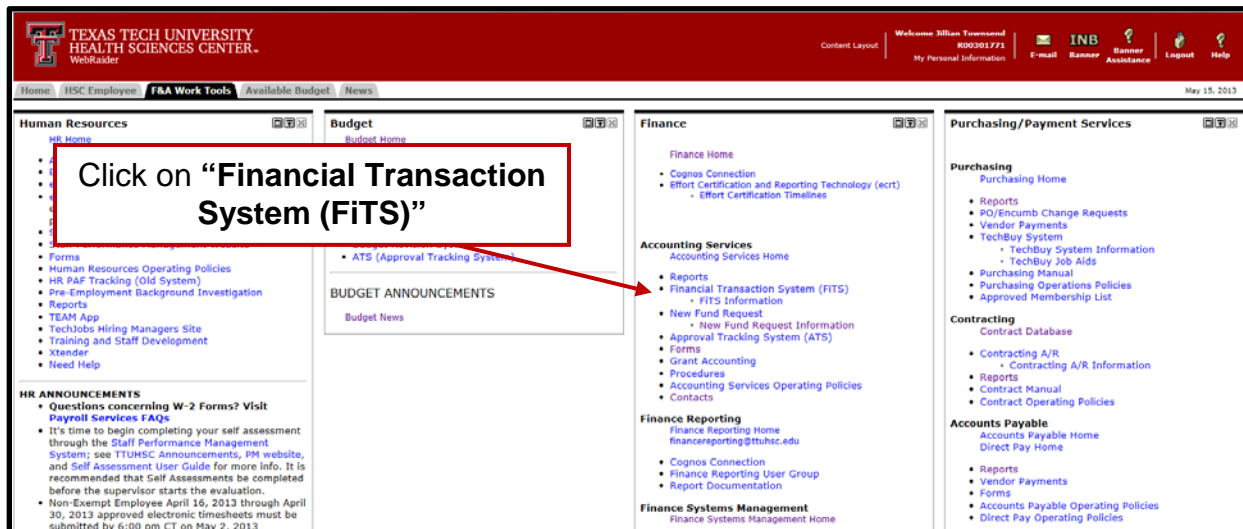
After review and approval, the system will post the IPFT to Banner. Departmental approval, functional review, and final approvals are managed through FiTS. Transaction tracking, archiving, and retrieving of information related to the IPFT is managed within the system as well.

FiTS replaces the IPFT Form that is normally submitted to Accounting Services.

FiTS allows a departmental user to do the following:

- Start an IPFT request
- Resume completion of an IPFT request
- Submit an IPFT request to approvals
- Approve, Reject, or Delete an IPFT request
- Review the Status of an IPFT request
- Review the History of an IPFT request

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

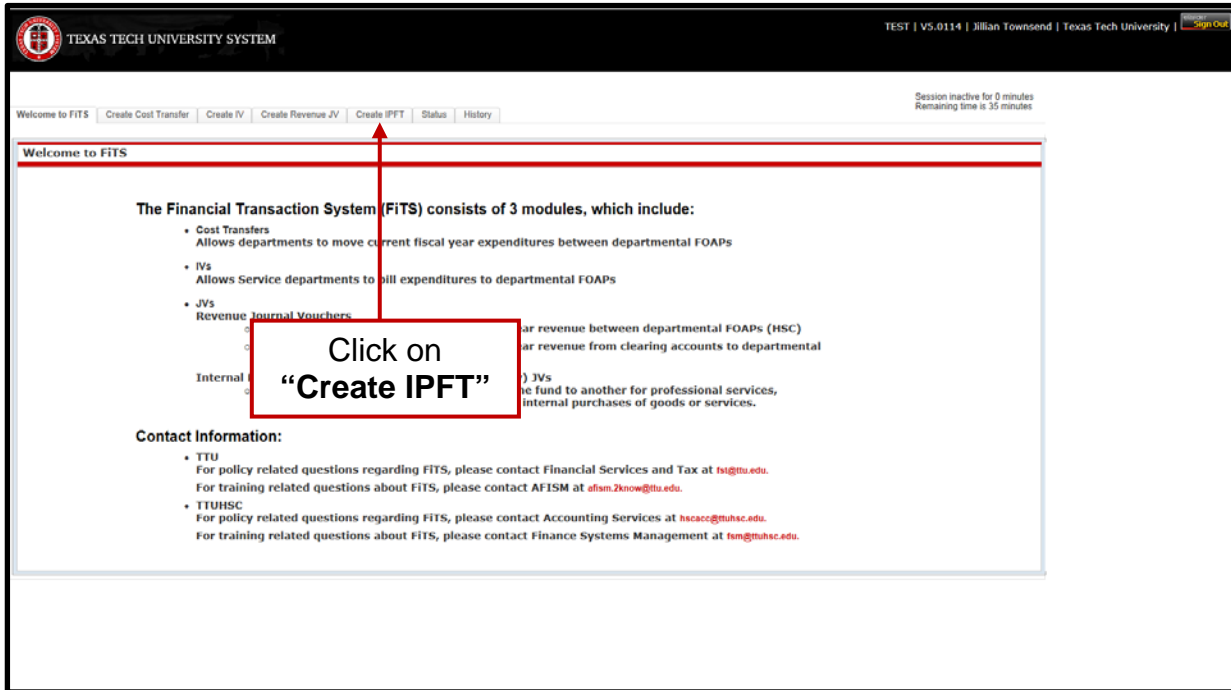


The screenshot shows the WebRaider portal interface. A red box highlights the text "Click on 'Financial Transaction System (FiTS)'" with an arrow pointing to the "Financial Transaction System (FiTS)" link in the Accounting Services menu. The menu structure is as follows:

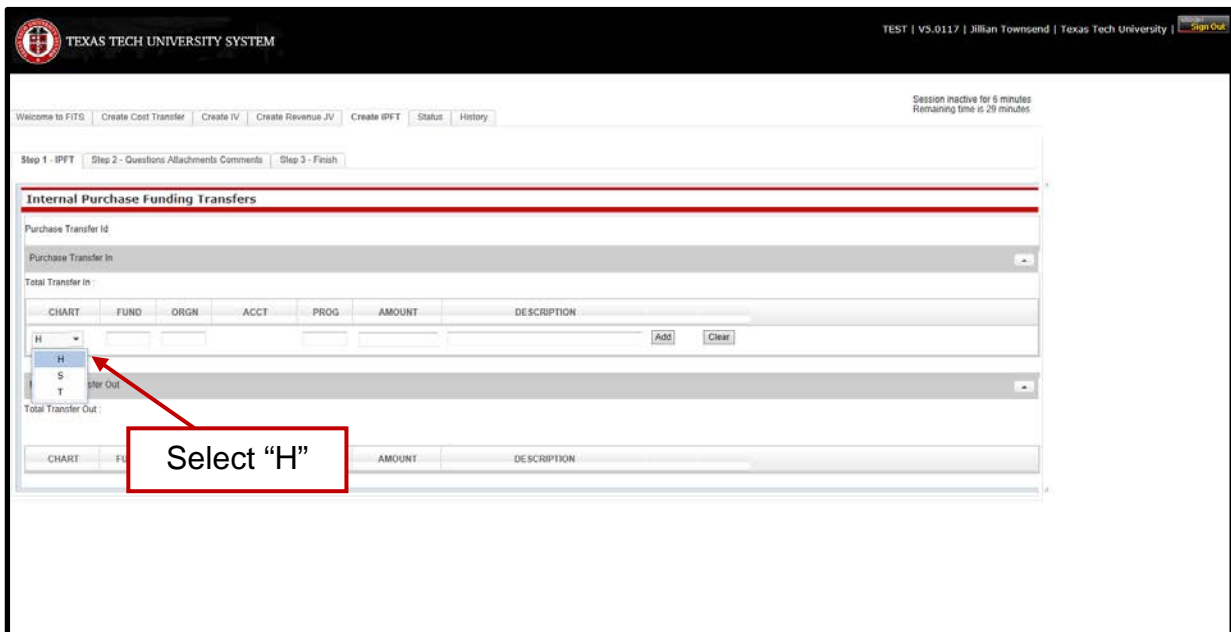
- Human Resources
 - HR Home
 - Forms
 - Human Resources Operating Policies
 - HR PAF Tracking (Old System)
 - Pre-Employment Background Investigation
 - Reports
 - TEAM App
 - TechJobs Hiring Managers Site
 - Training and Staff Development
 - Xtender
 - Need Help
- Budget
 - Budget Home
 - ATS (Approval Tracking System)
 - BUDGET ANNOUNCEMENTS
 - Budget News
- Finance
 - Finance Home
 - Cognos Connection
 - Effort Certification and Reporting Technology (ecrt)
 - Effort Certification Timelines
 - Accounting Services
 - Accounting Services Home
 - Reports
 - Financial Transaction System (FiTS)
 - FiTS Information
 - New Fund Request
 - New Fund Request Information
 - Approval Tracking System (ATS)
 - Forms
 - Grant Accounting
 - Procedures
 - Accounting Services Operating Policies
 - Contacts
 - Finance Reporting
 - Finance Reporting Home
 - finance.reporting@ttuhsc.edu
 - Cognos Connection
 - Finance Reporting User Group
 - Report Documentation
 - Finance Systems Management
 - Finance Systems Management Home
- Purchasing/Payment Services
 - Purchasing
 - Purchasing Home
 - Reports
 - PO/Encumb Change Requests
 - Vendor Payments
 - TechBuy System
 - TechBuy System Information
 - TechBuy Job Aids
 - Purchasing Manual
 - Purchasing Operations Policies
 - Approved Membership List
 - Contracting
 - Contract Database
 - Contracting A/R
 - Contracting A/R Information
 - Reports
 - Contract Manual
 - Contract Operating Policies
 - Accounts Payable
 - Accounts Payable Home
 - Direct Pay Home
 - Reports
 - Vendor Payments
 - Forms
 - Accounts Payable Operating Policies
 - Direct Pay Operating Policies

Creating an IPFT

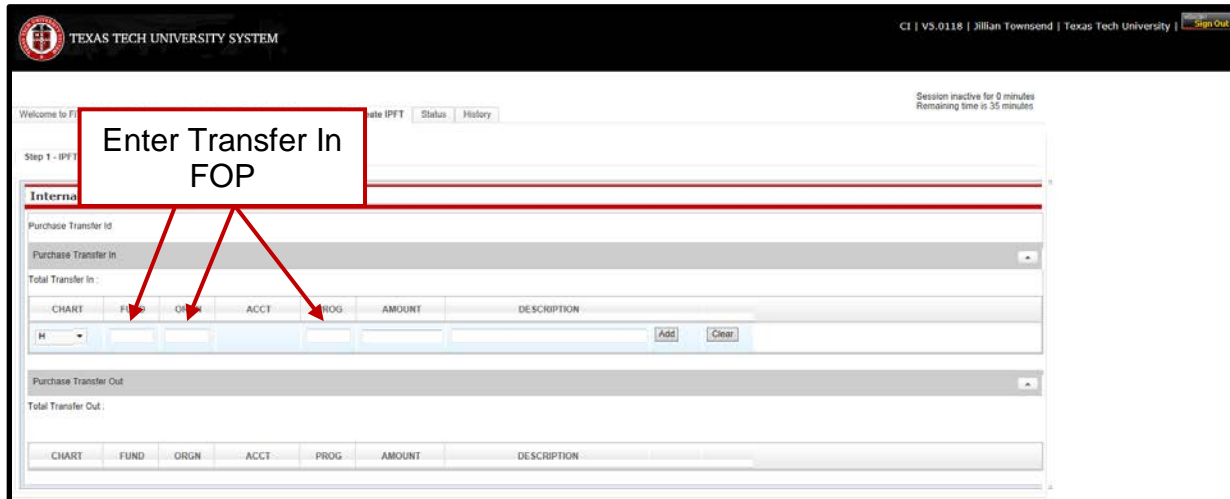
To begin an IPFT, click on the **“Create IPFT”** tab at the top of the webpage.



Begin each IPFT by selecting “H” from the “Chart” drop down box.



After selecting “H” in the “Chart” drop down box under the “Purchase Transfer In” section, continue by entering the Purchase Transfer In Fund-Orgn-Prog (FOP) of the department receiving payment for the professional services, continuing professional education, and other internal purchases of goods or services.



TEXAS TECH UNIVERSITY SYSTEM

CI | V5.0118 | Jillian Townsend | Texas Tech University | [Sign Out](#)

Welcome to FITS | [Create IPFT](#) | [Status](#) | [History](#) | Session inactive for 0 minutes
Remaining time is 35 minutes

Step 1 - IPFT

Enter Transfer In FOP

Internal

Purchase Transfer In

Total Transfer In:

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION
H						

[Add](#) [Clear](#)

Purchase Transfer Out

Total Transfer Out:

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION

Since FITS auto-populates the appropriate Account codes for the transaction being entered, manually entering Account codes is not necessary.

When the Purchase Transfer In FOP has been entered, enter the amount of the payment to be transferred and a description that states the period of service or reference to departmental agreement. The description line is limited to 35 characters and will appear on the ledgers.

Click the “**Add**” button after all required information is entered to save your progress.



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Welcome to FITS | [Create IPFT](#) | [Status](#) | [History](#) | Session inactive for 0 minutes
Remaining time is 35 minutes

Step 1 - IPFT

Enter the Amount to be Transferred In

Enter the Description

Click “Add” to save progress

Internal

Purchase Transfer In

Total Transfer In:

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION
H	181034	201131		60	5.00	Test IPFT

[Add](#) [Clear](#)

Purchase Transfer Out

Total Transfer Out:

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION



Once the Purchase Transfer In line has been completed, a Purchase Transfer ID (FiTS ID) is assigned. The FiTS ID can be used to track your IPFT throughout the approval process.

TEXAS TECH UNIVERSITY SYSTEM

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Welcome to FiTS | Create Cost Transfer | **FiTS ID** | History

Step 1 - IPFT | Step 2 - Questions Attachments Comments | Step 3 - Finish

Internal Purchase Funding Transfers

Purchase Transfer ID **PT000046**

Purchase Transfer In

Total Transfer In: 5.00

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION	
H	181034	201131		60	5.00	Test IPFT	Edit Delete

Purchase Transfer Out

Total Transfer Out: 0.00

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION	
H							Add Clear

When the Purchase Transfer In section has been completed, you can move to the "Purchase Transfer Out" section to enter the FOP of the department to be charged for the service(s) provided.

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

Step 1 - IPFT | Step 2 - Questions Attachments Comments | Step 3 - Finish

Internal Purchase Funding Transfers

Purchase Transfer ID **PT000046**

Purchase Transfer In

Total Transfer In: 5.00

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION	
H	181034	201131		60	5.00	Test IPFT	Edit Delete

Purchase Transfer Out

Total Transfer Out: 0.00

CHART	FUND	ORGN	ACCT	PROG	AMOUNT	DESCRIPTION	
H	181388	201193	822800	60	5.00	Test IPFT	Add Clear

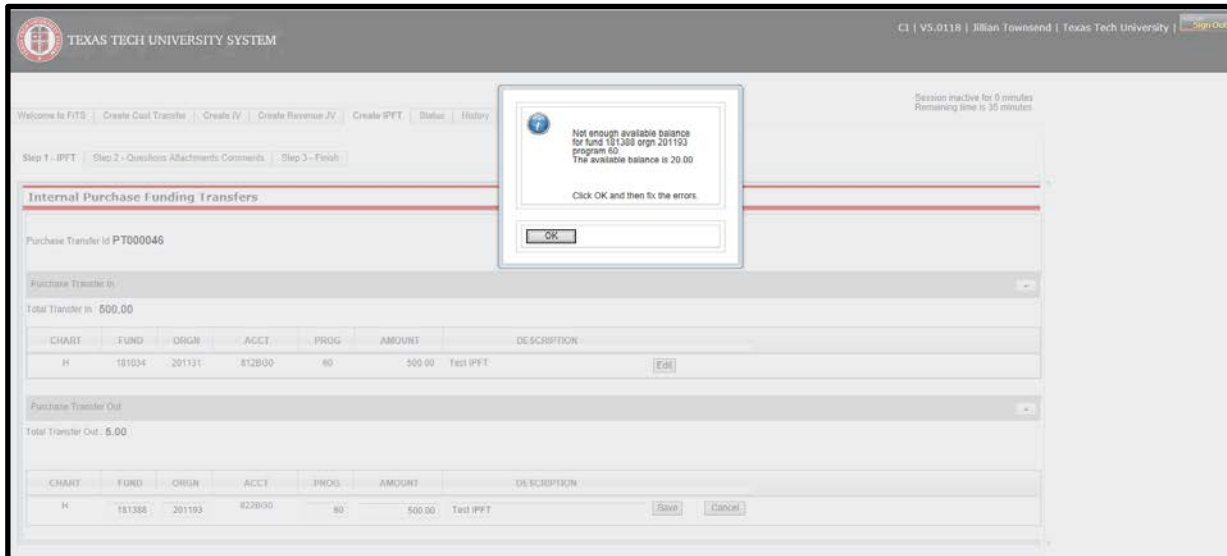
Enter the Amount to be Transferred

Enter the Description

Click "Add" to save progress

Enter Transfer Out FOP

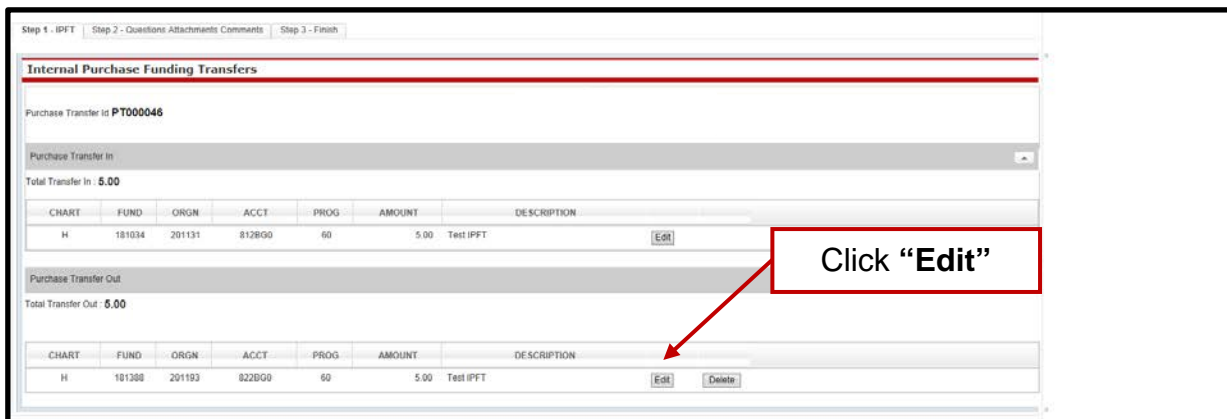
Selecting **“Add”** on the Purchase Transfer Out line will notify you of any budgetary errors that may exist in the form of a popup message.



If you receive a budget error, the popup message will indicate that the Purchase Transfer Out FOP does not have enough budget in the 8096 Budget Account Pool. At this time the Purchase Transfer Out FOP may be edited or the IPFT may be set to “Started and will mark Complete later” so a Budget Revision (BR) can be submitted through the online Budget Revision System to budget funds in the 8096 Budget Account Code (BAC) in order for the IPFT to be completed. Once the budget error is corrected, you can continue with the completion of the IPFT.

If the need arises for a line on the IPFT to be edited before submitting to Approvals, certain steps must be taken depending on which line needs to be changed.

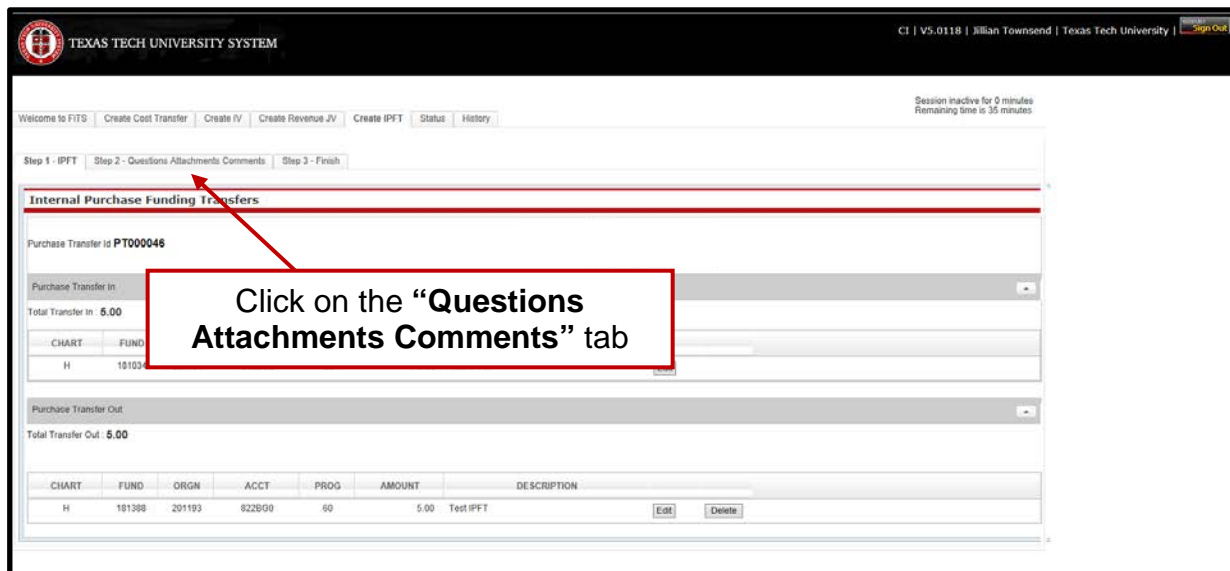
To edit the Purchase Transfer Out line, click the **“Edit”** button to the right and make the necessary changes.



When editing the Purchase Transfer In line, changes to the Fund requires that the Purchase Transfer Out line be deleted. This requirement is due to the system's auto-population of Account codes.

Once the change to the Fund is made, the Purchase Transfer Out line must be reentered and added.

After all required fields have been completed on the "Step 1 - IPFT" tab, select the "**Step 2 - Questions Attachments Comments**" tab.



On the "**Step 2 - Questions Attachments Comments**" tab, you must answer all questions with clear and adequate information. There are three standard questions:

- What internal goods or services have been provided?
- Are these goods or services provided to TTUHSC departments on a regular basis?
- Is the rate charged for the goods or services used consistently for all TTUHSC department funds?

A fourth question will appear if the expense to be charged is on a restricted fund (i.e. 22Z, 23, 23Z, 24, and 24Z fund types):

- How is the expense directly allowable and appropriate on this restricted fund?

To add answers to the required questions, click on the "**Edit Answers**" button. Each question requires an answer or the IPFT cannot be submitted.



TEXAS TECH UNIVERSITY SYSTEM

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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 35 minutes

Step 1 - IPFT | Step 2 - Questions Attachments Comments | Step 3 - Finish

Questions Attachments and Comments

PT000046

Questions

[Edit Answers](#)

Question

Please attach documentation that supports the amount being charged for the good or service.

What internal goods or services have been provided?

Are these goods or services provided to TTUHSC departments on a regular basis?

Is the rate charged for the goods or services used consistently for all TTUHSC departments?

Attachments

[Upload Attachment](#)

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

DOCUMENT NAME	DATE	ACTION
---------------	------	--------

After completing all of the required questions, click the **“Save Answers”** button.

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CI | V5.0118 | 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 - IPFT | Step 2 - Questions Attachments Comments | Step 3 - Finish

Questions Attachments and Comments

PT000046

Questions

[Save Answers](#) [Cancel](#)

Question

Please attach documentation that supports the amount being charged for the good or service.

What internal goods or services have been provided?

Are these goods or services provided to TTUHSC departments on a regular basis?

Is the rate charged for the goods or services used consistently for all TTUHSC departments?

Attachments

[Upload Attachment](#)

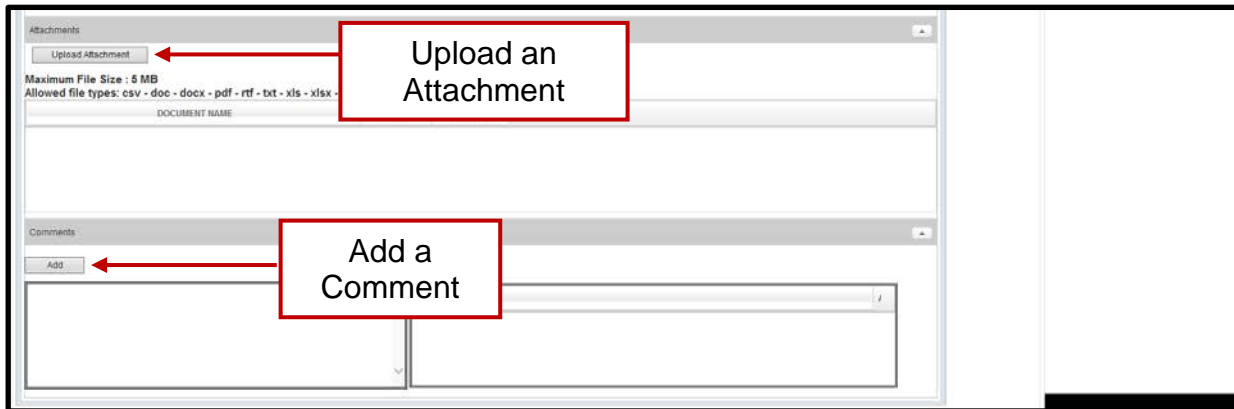
Maximum File Size : 5 MB
Allowed file types: csv - doc - docx - pdf - rtf - txt - xls - xlsx - xml

DOCUMENT NAME	DATE	ACTION
---------------	------	--------

If you do not click the **“Save Answers”** button before navigating to another tab, or page, the system will not save your answers and you will lose all the information you have entered.

Below the “Questions” section are the “Attachments” and “Comments” sections. In the “Attachments” section, you must upload an attachment (in one of the allowed file types) to provide documentation that supports the amount being charged for the good or service as noted in the statement in the “Questions” section.

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



Once you have answered all of the required questions and added the required attachments or provided additional comments, 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 IPFT as complete.
 - o Once clicked, it will take you back to a blank “**Step 1 - IPFT**” tab to begin a new IPFT if desired.
 - o To mark the IPFT as Complete after clicking this option, search for the IPFT in the “**Status**” tab (instructions located below).
- Mark as Complete
 - o Clicking this button marks the IPFT as complete in the system, but will not route through approvals.
 - o To send the IPFT to approvals after clicking this option, search for the IPFT in the “**Status**” tab (instructions located below).
- Submit to Approvals
 - o Clicking this button will send the IPFT to the Approval queues for each fund’s TEAM App Financial Manager and Approver(s) and Accounting Services for review, approval, or rejection.



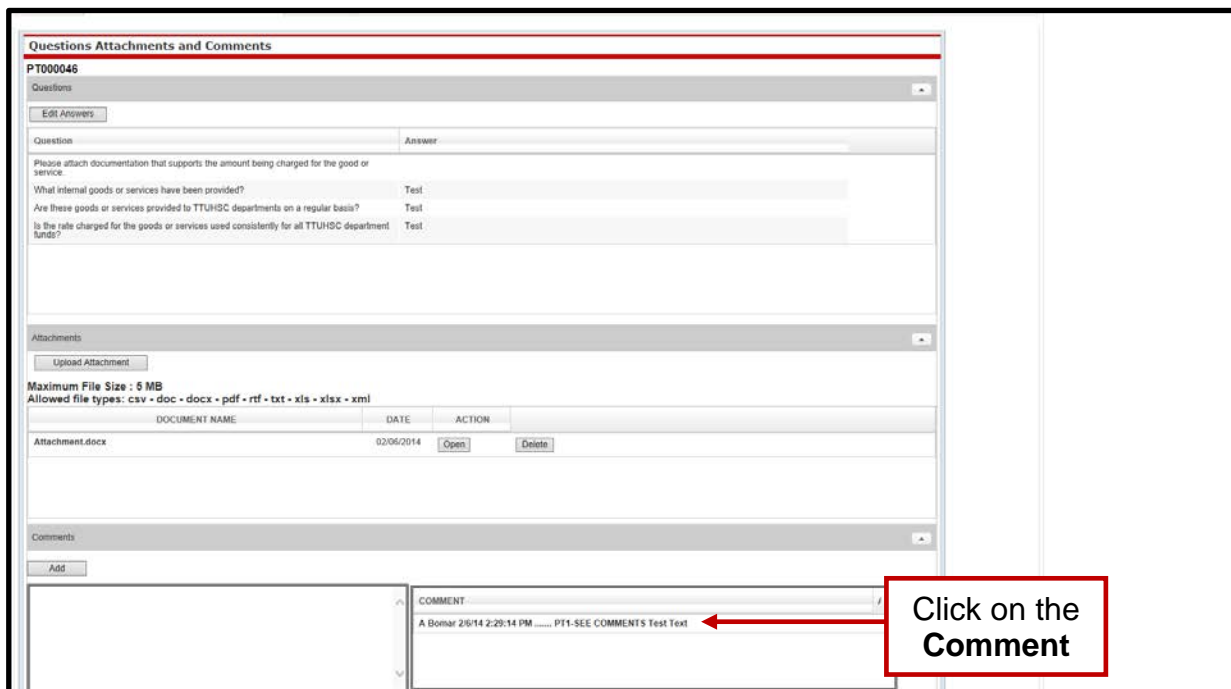
If you select **“Mark as Complete”**, this does not send the IPFT to approvals. In order to send the IPFT to approvals, navigate to the **“Status”** tab and locate your IPFT by the FITS ID. Once located, select the **“Approvals”** button.

The screenshot shows the 'Status' tab in the Texas Tech University System. It includes search filters for Chart, Fund, Orgn, and User, and a table of FITS Documents. The table has columns for FITS ID, asc, STATUS, ORIGINATOR, LAST MOD DATE, and LAST MODIFIED BY. The document PT000046 is highlighted, and its 'Approvals' button is pointed to by a red arrow from a text box.

FITS ID	asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
IV000016		Started	Jillian Townsend	01 / 31 / 2014	Jillian Townsend	Edit	Delete
PT000030		Started	Jillian Townsend	01 / 28 / 2014	Ricky Baker	Edit	Delete
PT000046		Completed	Jillian Townsend	02 / 05 / 2014	Jillian Townsend	Edit	Delete Approvals

After the IPFT is submitted to approvals, the TEAM App Financial Managers or Approvers, along with Accounting Services will have the option to either Approve or Reject the IPFT. If errors or lack of justification are found, the IPFT can be rejected.

In the case of rejection, the IPFT Originator will receive a rejection email notification from ITIS Financial Transaction Entry System. The email will reference the specific FiTS ID that has been rejected with a link that will take you to the **“Step 2 – Questions Attachments Comments”** tab of the IPFT. Scroll down to the “Comments” section to review the rejection reason and comments pertaining to the rejection. To expand the comments, click on the desired comment within the Comment box to review the rejection reason or comments added by the reviewer.



Questions Attachments and Comments

PT000046

Questions

Edit Answers

Question	Answer
Please attach documentation that supports the amount being charged for the good or service.	
What internal goods or services have been provided?	Test
Are these goods or services provided to TTUHSC departments on a regular basis?	Test
Is the rate charged for the goods or services used consistently for all TTUHSC department funds?	Test

Attachments

Upload Attachment

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

DOCUMENT NAME	DATE	ACTION
Attachment.docx	02/06/2014	Open Delete

Comments

Add

COMMENT

A Bomar 2/6/14 2:29:14 PM P11-SEE COMMENTS Test Text

Click on the Comment

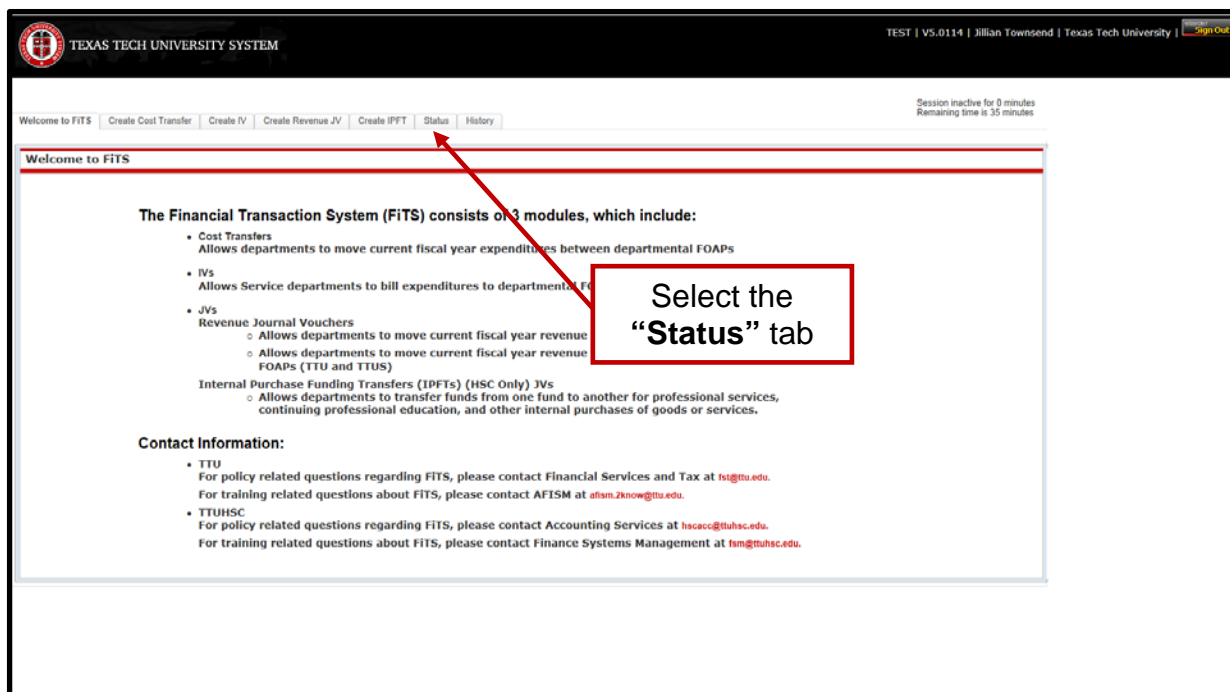
The rejection reason and any comments pertaining to the rejection will be shown in the form of a popup message.

After reviewing the rejection reason and/or comments, modify the IPFT accordingly. After providing the requested information or making the requested changes, click on the “**Step 3 – Finish**” tab and select the “**Approvals**” button to send the rejected IPFT through the approval process again.

Deleting a IPFT

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

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



After selecting the “**Status**” tab, the screen will populate with all of the IPFTs that you originated that have not been completely approved and processed or that need your approval (if you are a TEAM App Financial Manager or Approver).

Search for the IPFTS(s) you wish to delete by Fund, Orgn, a date range that the IPFT 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 18 of this training document.

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



TEXAS TECH UNIVERSITY SYSTEM

CI | V5.0118 | 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: H Fund: Orgn: User: Clear User

Date from: Date to: Clear Dates

FITS Id: Search Clear Search

Select a Document Type: ALL OCT NOV OPT

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

Searched Documents

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY	
PT000024	Submitted	Carole Wardroup	01 / 27 / 2014	Ricky Baker	Review
PT000025	Submitted	Ricky Baker	01 / 28 / 2014	Jillian Townsend	Review
PT000026	Rejected	Carole Wardroup	01 / 31 / 2014	Ricky Baker	Rejected
PT000028	Started	Carole Wardroup	01 / 28 / 2014	Ricky Baker	Not Completed
PT000030	Started	Jillian Townsend	01 / 28 / 2014	Ricky Baker	Edit Delete
PT000037	Started	Carole Wardroup	01 / 28 / 2014	Carole Wardroup	Not Completed
PT000041	Rejected	Ricky Baker	02 / 04 / 2014	Ricky Baker	Rejected
PT000042	Started	Ricky Baker	02 / 04 / 2014	Ricky Baker	Not Completed
PT000043	Submitted	Suzanne Dean	02 / 05 / 2014	Suzanne Dean	Review
PT000045	Submitted	Jillian Townsend	02 / 05 / 2014	Jillian Townsend	Review

[21 - 38 / 47]

After clicking the **“Delete”** button, the system will ask you, in the form of a popup message, if you are sure you would like to delete the IPFT. If you are sure of your selection, click **“OK”**. If not, click **“Cancel”**.

TEXAS TECH UNIVERSITY SYSTEM

CI | V5.0118 | 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

Status

Chart: H Fund: Orgn: User: Clear User

Date from: Date to: Clear Dates

FITS Id: Search Clear Search

Select a Document Type: ALL OCT NOV OPT

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

Searched Documents

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY	
PT000024	Submitted	Carole Wardroup	01 / 27 / 2014	Ricky Baker	Review
PT000025	Submitted	Ricky Baker	01 / 28 / 2014	Jillian Townsend	Review
PT000026	Rejected	Carole Wardroup	01 / 31 / 2014	Ricky Baker	Rejected
PT000028	Started	Carole Wardroup	01 / 28 / 2014	Ricky Baker	Not Completed
PT000030	Started	Jillian Townsend	01 / 28 / 2014	Ricky Baker	Edit Delete
PT000037	Started	Carole Wardroup	01 / 28 / 2014	Carole Wardroup	Not Completed
PT000041	Rejected	Ricky Baker	02 / 04 / 2014	Ricky Baker	Rejected
PT000042	Started	Ricky Baker	02 / 04 / 2014	Ricky Baker	Not Completed
PT000043	Submitted	Suzanne Dean	02 / 05 / 2014	Suzanne Dean	Review
PT000045	Submitted	Jillian Townsend	02 / 05 / 2014	Jillian Townsend	Review

[21 - 38 / 47]



If the IPFT you have searched for does not have the “**Delete**” button populated to the right, the IPFT does not have the option to be deleted.

If the IPFT needs to be deleted, coordinate with a TEAM App Financial Manager or Approver or Accounting Services to have it rejected in the system.

The approval status can be determined by clicking the “**Review**” button next to the IPFT to be deleted. This list will indicate who has the option of rejecting the IPFT.

There will be an option to delete the IPFT after it has been rejected. You will need to search within the “**Status**” tab for the FiTS ID to be deleted.

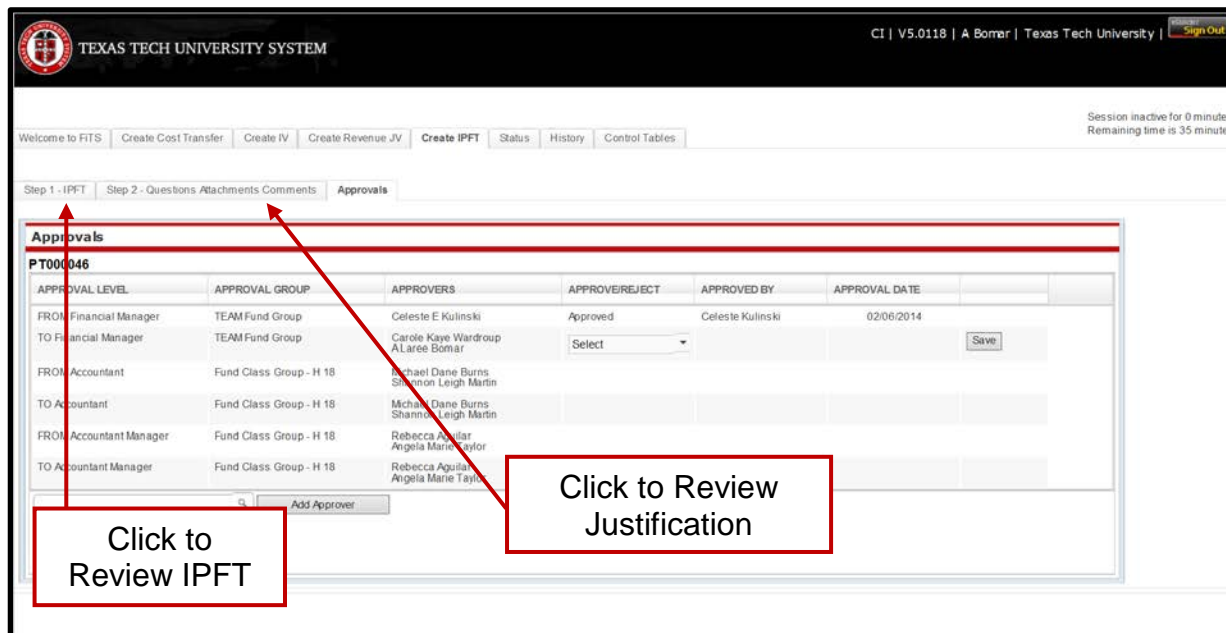
PTs that remain in the “**Status**” tab and have not been modified for 7 days will result in an email to the Originator informing them that the PT will be deleted the following Monday. To prevent the PT from being deleted, the Originator will need to make the necessary corrections before the following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

Approving an IPFT

After the IPFT has been submitted for approvals, the TEAM App Financial Manager and Approver(s) for each Fund included in the IPFT will receive an email notification from ITIS Financial Transaction Entry System informing them that there is an IPFT waiting for their review and approval/rejection. The email will reference the IPFT that has been submitted for approvals by its FiTS ID and will contain the link to the IPFT that needs approval.

After clicking the link provided in the email notification, the TEAM App Financial Manager and Approver(s) will be taken to the “Approvals” tab of the IPFT referenced in the email.

From the “**Approvals**” tab, the TEAM App Financial Manager or Approver can select the “**Step 1 - IPFT**” tab to review the IPFT details or the “**Step 2 - Questions Attachments Comments**” tab to review the responses to the questions provided by the Originator, as well as the required attachments or optional comments.



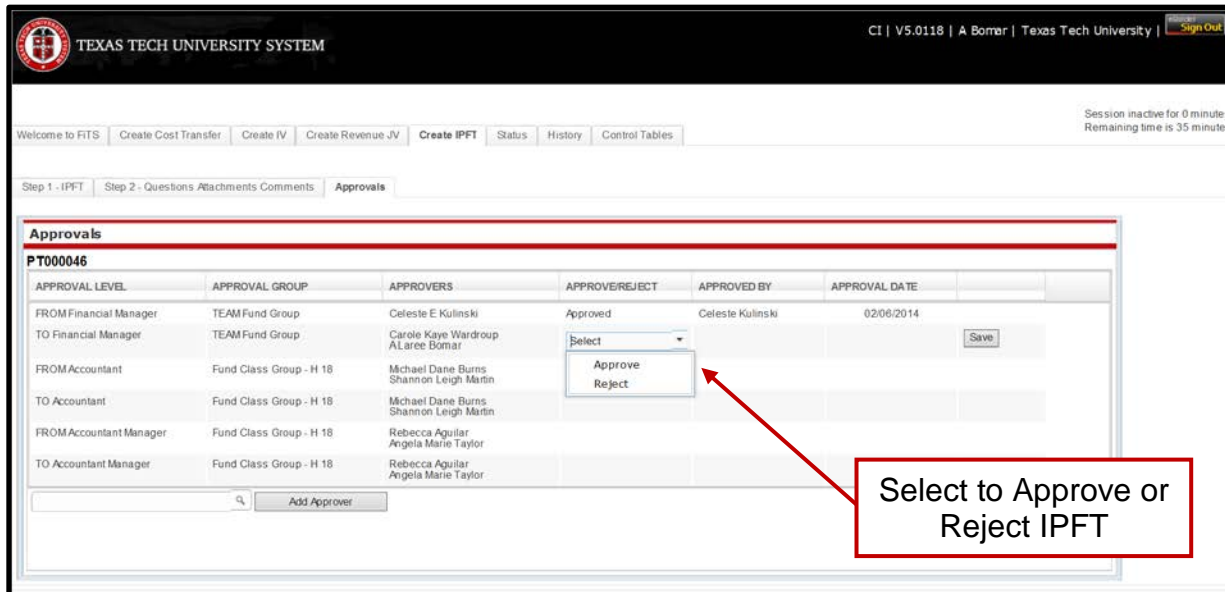
The screenshot displays the "Approvals" section for IPFT PT000046. The table below shows the approval details:

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	Celeste E Kulinski	Approved	Celeste Kulinski	02/06/2014
TO Financial Manager	TEAM Fund Group	Carole Kaye Wardrop A Larée Bomar	Select		
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilera Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilera Angela Marie Taylor			

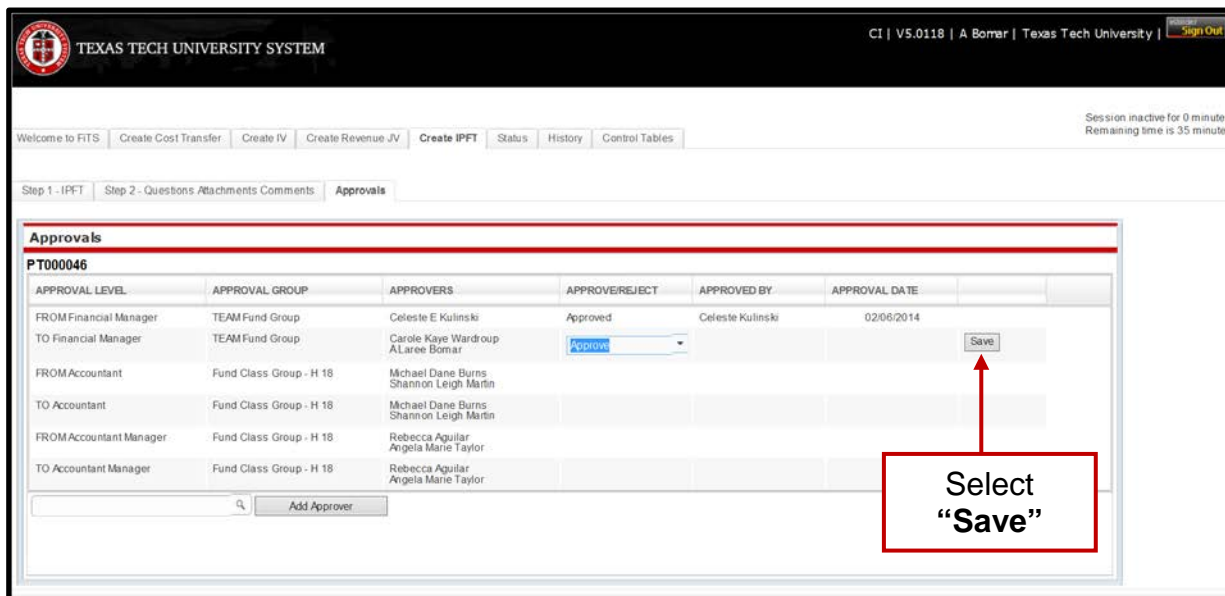
The interface includes a navigation bar with tabs for "Step 1 - IPFT", "Step 2 - Questions Attachments Comments", and "Approvals". A "Save" button is visible next to the "APPROVE/REJECT" column.

TEAM App Financial Managers and Approvers can add additional information in the form of an attachment or comment before approving or rejecting the IPFT.

After reviewing the IPFT, TEAM App Financial Managers and Approvers can choose whether to Approve or Reject the IPFT from the drop down box.



TEAM App Financial Managers and Approvers choosing to approve an IPFT will need to select “Approve” from the drop down box on the “Approvals” tab and then select the “**Save**” button.



After selecting “**Save**”, the system will ask if you are sure you wish to approve the document on all approval levels that are available for your approval.



If a TEAM App Financial Manager or Approver has more than one fund on an IPFT, selecting “Approve” will initiate a blanket approval for all funds that belong to them. If one of the funds needs to be rejected, you must select “Reject” first, or the blanket approval will go into effect and will forward the IPFT to Accounting Services for approval and processing.

TEXAS TECH UNIVERSITY SYSTEM

CI | V5.0118 | A Bomar | Texas Tech University | [Sign Out](#)

Welcome to FTS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#)

Step 1 - IPFT | Step 2 - Questions Attachments Comments | Approvals

Approvals

PT000046

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	Celeste E Kulinski	02/06/2014
TO Financial Manager	TEAM Fund Group	Carole Kaye Wardrop ALaree Bomar	
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin	
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin	
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor	
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor	

Save

Session inactive for 0 minutes
Remaining time is 35 minutes

Are you sure you wish to approve this document?
By clicking YES at this approval level then all other approval levels that you have available to APPROVE will be marked as APPROVED.
If you need to REJECT at another approval level then do so by selecting REJECT on the approval level you want to reject at.

Yes No

Click “Yes” If Approving for All Responsible Funds

If rejecting, a TEAM App Financial Manager or Approver must select “Reject” from the drop down box under the “Approvals” tab. After selecting “Reject” you will be required to select a Rejection Reason and provide an explanation.

Approvals

PT000046

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	Celeste E Kulinski	Approved	Celeste Kulinski	
TO Financial Manager	TEAM Fund Group	Carole Kaye Wardrop ALaree Bomar	Reject		
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			

Add Approver

REJECTION REASON: Select One

Select

PT1-SEE COMMENTS

Optional text:

Select “Reject”

Select Rejection Reason



Comments may be added to clarify the reason for rejection or to request additional information from the Originator of the IPFT.

After selecting the Rejection Reason and providing an explanation, click the **“Save”** button in order for FITS to save your progress.

The screenshot shows the 'Approvals' interface for item PT000046. It features a table with columns for APPROVAL LEVEL, APPROVAL GROUP, APPROVERS, APPROVE/REJECT, APPROVED BY, and APPROVAL DATE. The table lists several approvers, including Celeste E Kulinski, Carole Kaye Wardroup, Michael Dane Burns, and Rebecca Aguilar. A 'Save' button is visible next to the 'Reject' dropdown menu. Below the table is an 'Add Approver' button. Further down, there is a 'REJECTION REASON: Select One' dropdown menu, a 'PT1-SEE COMMENTS' dropdown menu, and an 'Optional Text' field with a text area. Red boxes and arrows highlight the 'Save' button and the 'Optional Text' field.

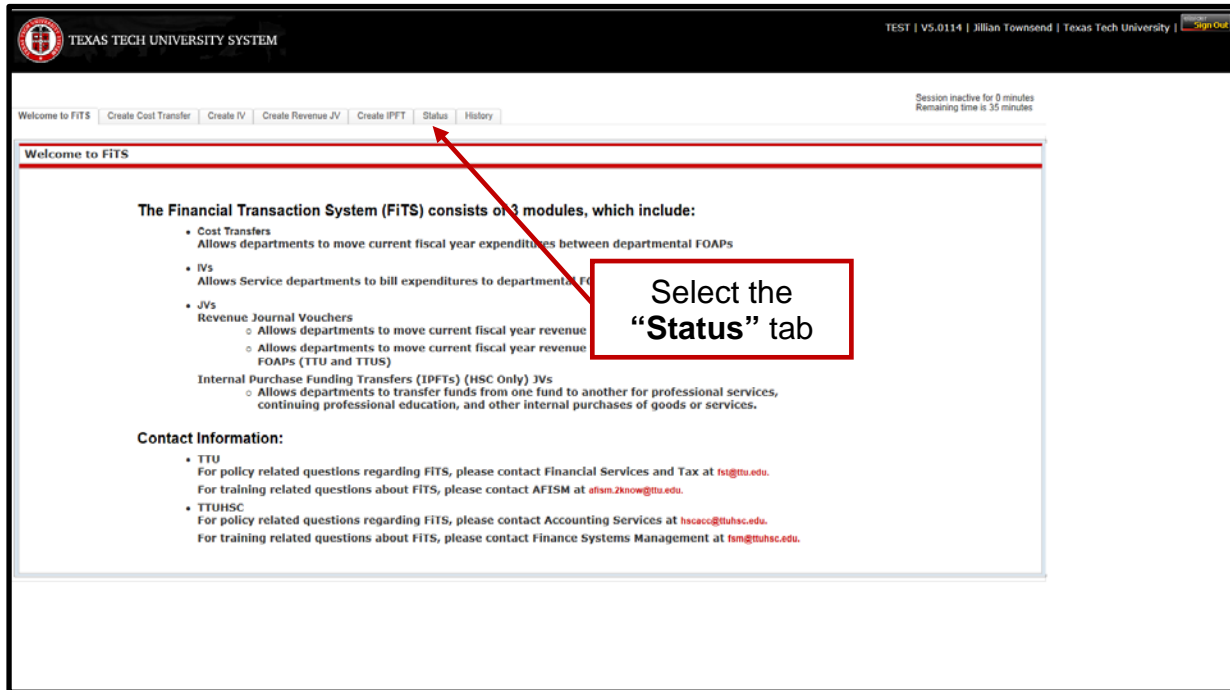
APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	Celeste E Kulinski	Approved	Celeste Kulinski	02/06/2014
TO Financial Manager	TEAM Fund Group	Carole Kaye Wardroup ALaree Bomar	Reject		
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			

After clicking the “Save” button, the system will ask if you are sure you wish to reject the IPFT. If you are, select “Yes”. If not, select “No”.

Searching the Status Tab

The “**Status**” tab can be used to search for any IPFT(s) that have not been completely processed and are pending Completion or Approvals.

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



The “Status” tab automatically populates with all IPFTs for which you are the Originator or a TEAM App Financial Manager or Approver.

Users can search for a specific IPFT 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 IPFTs 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

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY	Actions
CT000001		Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Delete
CT000002		Jillian Townsend	01 / 17 / 2014	Jillian Townsend	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 select the **“Clear Search”** button to clear the search fields.

Click **“Clear Search”** button

Click **“Search”** button

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
CT0001374		Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit Delete Approvals
CT0001375		Ricky Baker	01 / 21 / 2014	Ricky Baker	Edit Delete
CT0001376		Carole Wardroup	01 / 15 / 2014	Carole Wardroup	Edit Delete
CT0001377		Carole Wardroup	01 / 15 / 2014	Carole Wardroup	Edit Delete
CT0001378		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

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.

Select Number of Results to Display

Back & Forward Arrows

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete Approvals
IV000069	Star	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Star	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Star	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000059	Star	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete
PT000072	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000073	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000074	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete

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

Narrow Results by Document Type (PT)

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete Approvals
IV000069	Star	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Star	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Star	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000059	Star	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete
PT000072	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000073	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000074	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete



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

The screenshot shows the Texas Tech University System interface for FiTS. The top navigation bar includes links for 'Welcome to FiTS', 'Create Cost Transfer', 'Create IV', 'Create Revenue JV', 'Create IPFT', 'Status', and 'History'. The 'Status' section is active, displaying a search form with fields for 'Chart', 'Fund', 'Origin', and 'User'. Below the search form is a table titled 'Your FiTS Documents' with the following columns: 'FiTS ID asc', 'STATUS', 'ORIGINATOR', 'LAST MOD DATE', and 'LAST MODIFIED BY'. The table contains 13 rows of data, each with an 'Edit' and 'Delete' button. A red box highlights the 'FiTS ID Document Number' column.

FiTS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup
PT000058	Started	Jillian Townsend	01 / 22 / 2014	Jillian Townsend
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend

The search results will also show the following columns:

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

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

- **Started:** IPFT has been started by the Originator, but not marked complete. If you are the Originator for an IPFT, you will have the option to click the “**Edit**” button to make changes, or the “**Delete**” button to delete the IPFT from FiTS.
- **Completed:** IPFT has been marked complete, but not submitted to Approvals. If you are an Originator for an IPFT, you will have the option to click the “**Edit**”, “**Delete**”, or “**Approvals**” buttons. Selecting the “**Approvals**” button will send the IPFT into the approval process.
- **Submitted:** IPFT has been submitted for approvals. If you are the Originator for the IPFT, you will be able to check the progress of the approvals. If you are a Fund Manager or Approver you will have the option to approve the IPFT after clicking the “**Review**” button.



- **Rejected:** IPFT has been rejected in FiTS by a Fund Manager, Approver, or Accountant. If you are an Originator, you will have the option to “**Edit**” or “**Delete**” the IPFT.
- **Errors:** IPFT has incurred an error while trying to post. Please contact Financial Systems Management at AccountingElp@ttuhsc.edu for assistance.

TEXAS TECH UNIVERSITY SYSTEM

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: ALL CT IV MORT 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	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review	
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000059	Started	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Edit	Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
RT000023	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
RT000024	Started	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete

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

TEXAS TECH UNIVERSITY SYSTEM

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: ALL CT IV MORT 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	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review	
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000059	Started	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Edit	Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
RT000023	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
RT000024	Started	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete

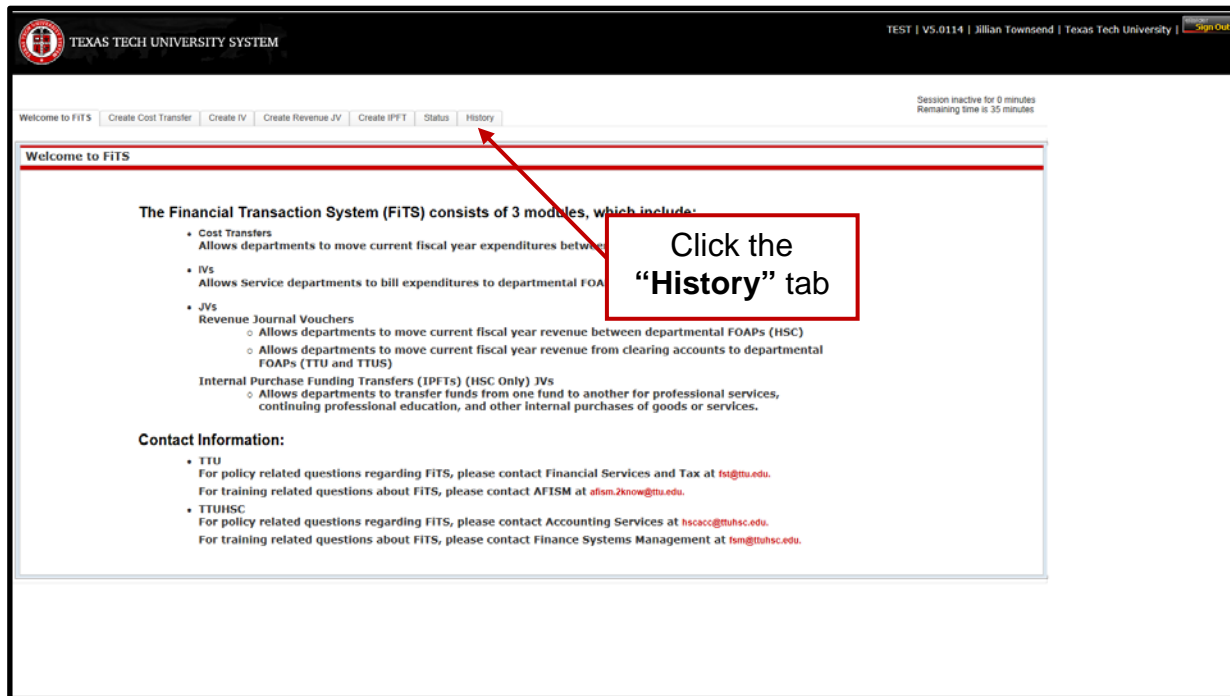
[1 - 10 / 11]



Searching the History Tab

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

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

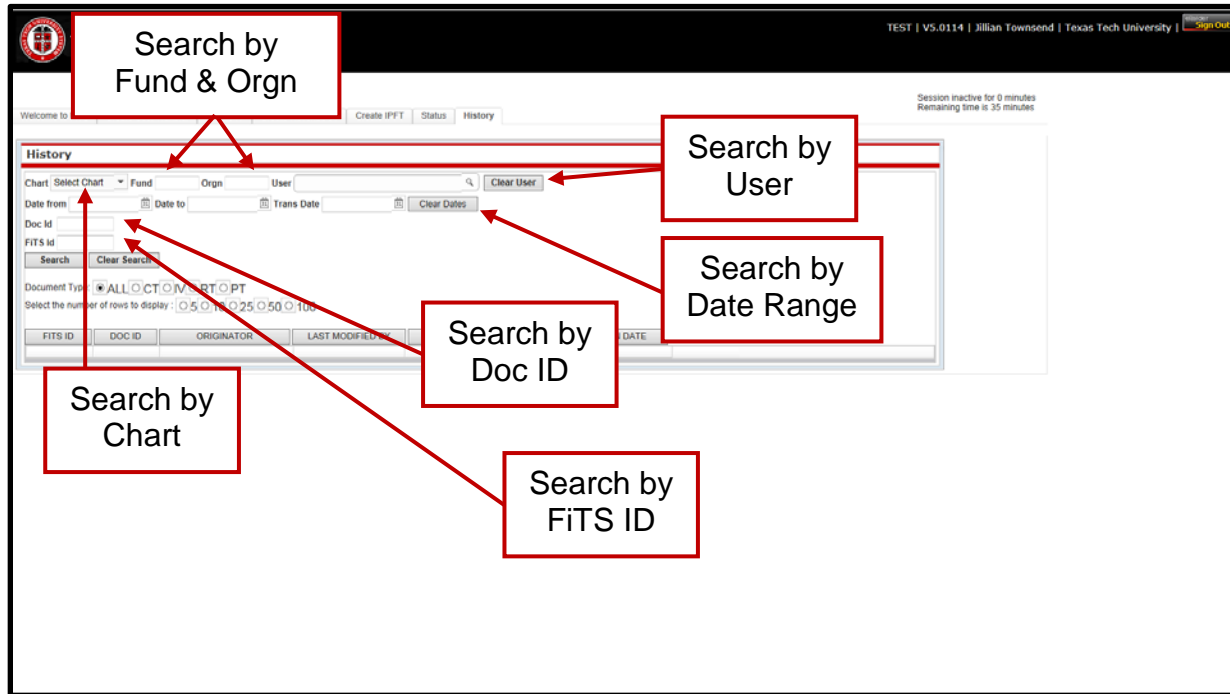


The **“History”** tab does not automatically populate with any IPFTs.

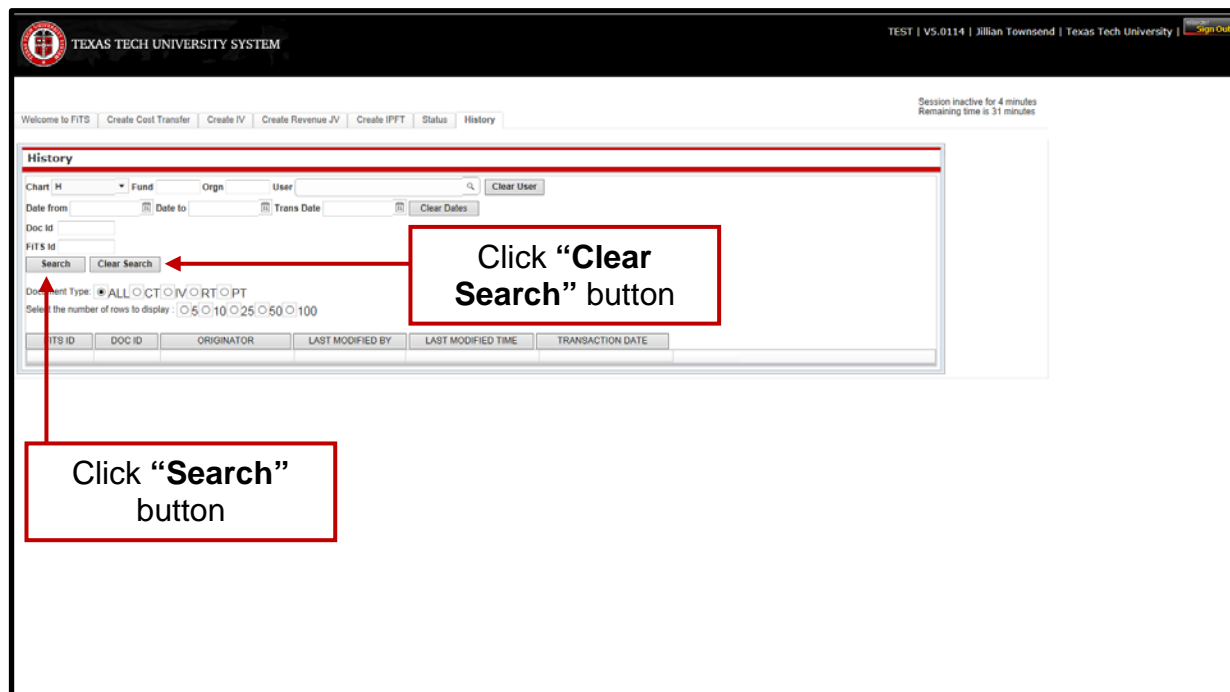
User can search for a specific IPFT the following ways:

- 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 IPFTs a user is involved in
- By Date Range: Returns results by date last modified
- By Transaction Date: Returns results for IPFTs posted by date entered
- By Doc ID: Enter all or a portion of the Banner Document ID that the IPFT was assigned when it was fully processed and posted
- By FiTS ID: Enter all or a portion of the ID

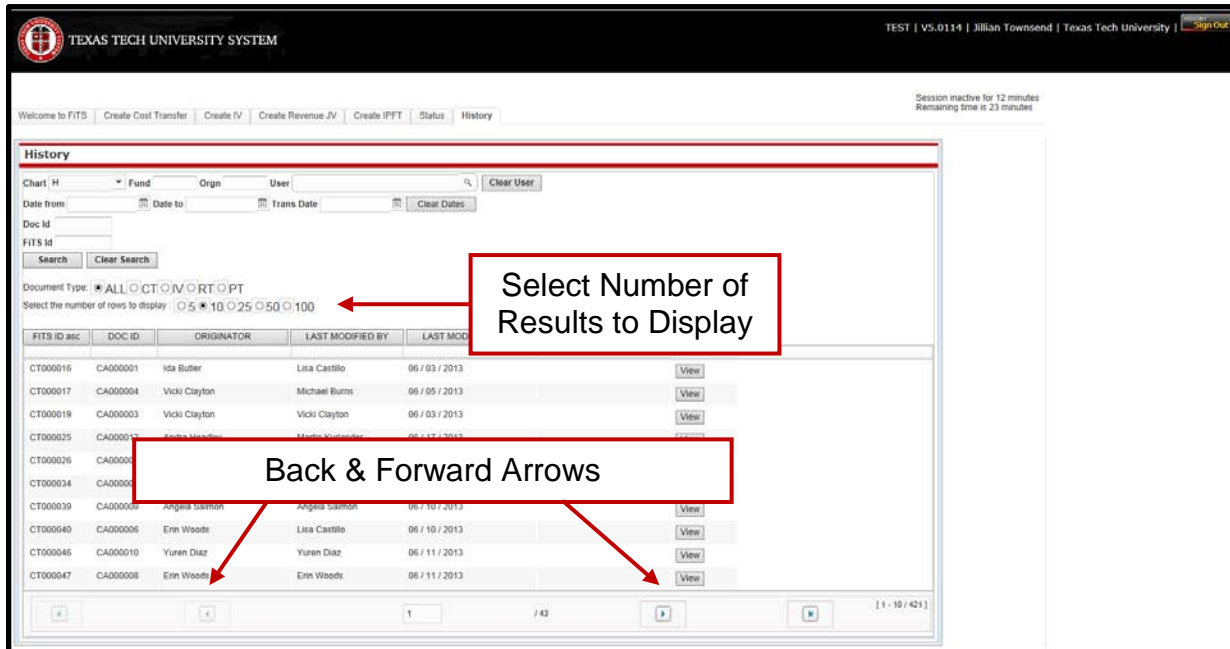
Users can search using multiple parameters from the list above. Depending on how many parameters are used, your search may have to be refined or expanded.



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



TEXAS TECH UNIVERSITY SYSTEM

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 12 minutes
Remaining time is 23 minutes

History

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

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

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

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

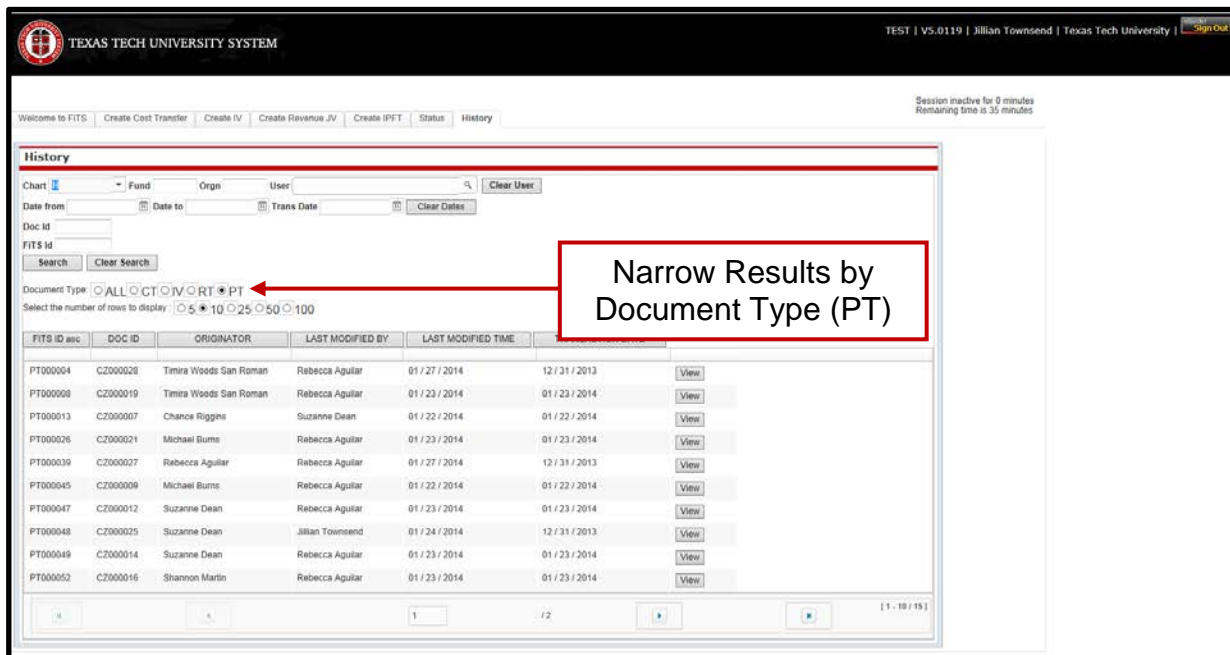
Document Type: ALL CT IV RT PT

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

FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME	
CT000016	CA000001	Ida Butler	Lisa Castillo	06 / 03 / 2013	View
CT000017	CA000004	Vicki Clayton	Michael Burns	06 / 05 / 2013	View
CT000019	CA000003	Vicki Clayton	Vicki Clayton	06 / 03 / 2013	View
CT000025	CA000001	Angela Shannon	Angela Shannon	06 / 10 / 2013	View
CT000026	CA000001	Erin Woods	Lisa Castillo	06 / 10 / 2013	View
CT000034	CA000001	Erin Woods	Lisa Castillo	06 / 10 / 2013	View
CT000039	CA000001	Angela Shannon	Angela Shannon	06 / 10 / 2013	View
CT000040	CA000006	Erin Woods	Lisa Castillo	06 / 10 / 2013	View
CT000046	CA000010	Yunan Diaz	Yunan Diaz	06 / 11 / 2013	View
CT000047	CA000008	Erin Woods	Erin Woods	06 / 11 / 2013	View

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



TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0119 | 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

History

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

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

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

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		
PT000004	C2000028	Timira Woods San Roman	Rebecca Agular	01 / 27 / 2014	12 / 31 / 2013	View
PT000008	C2000019	Timira Woods San Roman	Rebecca Agular	01 / 23 / 2014	01 / 23 / 2014	View
PT000013	C2000007	Chance Riggs	Suzanne Dean	01 / 22 / 2014	01 / 22 / 2014	View
PT000026	C2000021	Michael Burns	Rebecca Agular	01 / 23 / 2014	01 / 23 / 2014	View
PT000039	C2000027	Rebecca Agular	Rebecca Agular	01 / 27 / 2014	12 / 31 / 2013	View
PT000045	C2000009	Michael Burns	Rebecca Agular	01 / 22 / 2014	01 / 22 / 2014	View
PT000047	C2000012	Suzanne Dean	Rebecca Agular	01 / 23 / 2014	01 / 23 / 2014	View
PT000048	C2000025	Suzanne Dean	Jillian Townsend	01 / 24 / 2014	12 / 31 / 2013	View
PT000049	C2000014	Suzanne Dean	Rebecca Agular	01 / 23 / 2014	01 / 23 / 2014	View
PT000052	C2000016	Shannon Martin	Rebecca Agular	01 / 23 / 2014	01 / 23 / 2014	View

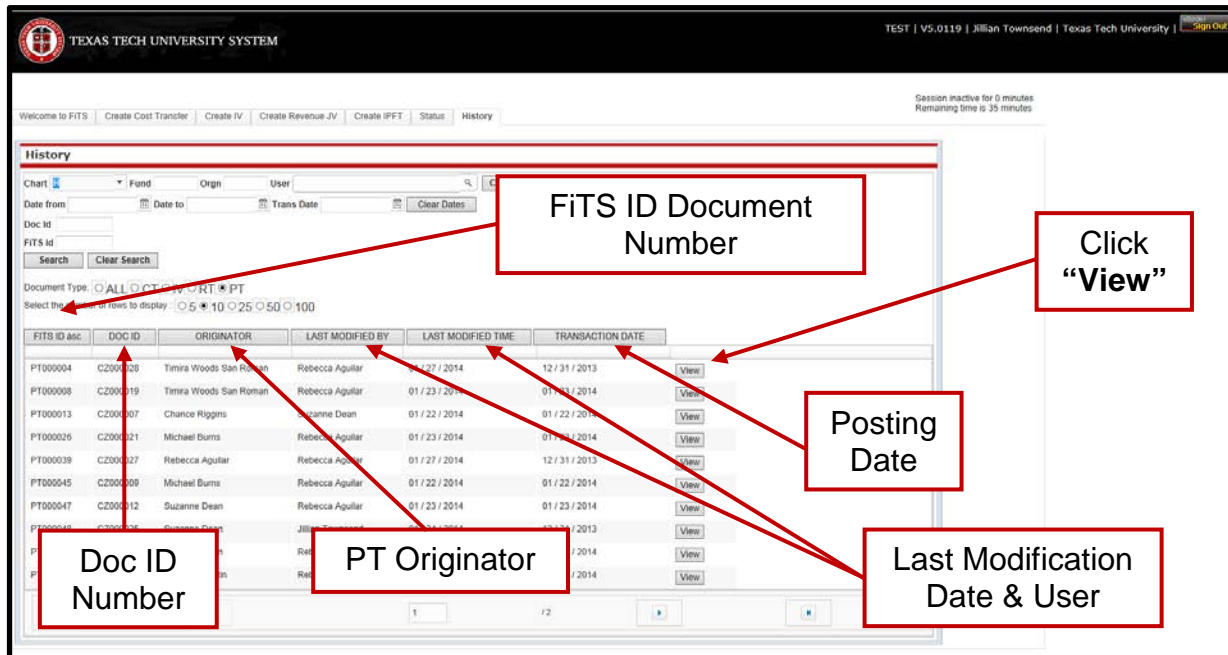
[1 - 10 / 15]

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 IPFT
- The User who last modified the IPFT
- The Date of the last modification to the IPFT
- The Date the IPFT was processed and posted

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



The screenshot shows the 'History' page in the Texas Tech University System. The table displays the following columns: FITS ID asc, DOC ID, ORIGINATOR, LAST MODIFIED BY, LAST MODIFIED TIME, and TRANSACTION DATE. Red callout boxes point to specific fields in the table:

- FITS ID Document Number**: Points to the 'FITS ID asc' column.
- Click "View"**: Points to the 'View' button in the first row.
- Posting Date**: Points to the 'TRANSACTION DATE' column.
- Last Modification Date & User**: Points to the 'LAST MODIFIED BY' and 'LAST MODIFIED TIME' columns.
- Doc ID Number**: Points to the 'DOC ID' column.
- PT Originator**: Points to the 'ORIGINATOR' column.

FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME	TRANSACTION DATE	View
PT000004	C2000020	Timira Woods San Roman	Rebecca Aguilera	01/27/2014	12/31/2013	View
PT000008	C2000019	Timira Woods San Roman	Rebecca Aguilera	01/23/2014	01/22/2014	View
PT000013	C2000007	Chance Riggins	Suzanne Dean	01/22/2014	01/22/2014	View
PT000026	C2000021	Michael Burns	Rebecca Aguilera	01/23/2014	01/22/2014	View
PT000039	C2000027	Rebecca Aguilera	Rebecca Aguilera	01/27/2014	12/31/2013	View
PT000045	C2000009	Michael Burns	Rebecca Aguilera	01/22/2014	01/22/2014	View
PT000047	C2000012	Suzanne Dean	Rebecca Aguilera	01/23/2014	01/23/2014	View

If you have a policy question regarding the IPFT process, please contact Accounting Services at AccountingElp@ttuhsc.edu.

If you have a training question about FiTS, please contact Finance Systems Management at FSMElp@ttuhsc.edu.